

PY381 Using the Single-Use Payroll Online Tool (SPOT)**Overview of the Using the Single-Use Payroll Online Tool (SPOT)**

The Single-Use Payroll Online Tool (SPOT) tool is used by Payroll Administrators to enter one-time transactions affecting pay or deductions in Cardinal. Transactions can be entered online in SPOT or through a spreadsheet upload.

This Job Aid provides information on entering earnings and deduction transactions (online or spreadsheet upload), deleting SPOT batches, SPOT transactions approvals, and reviewing batches after approval.

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PY381 Using the Single-Use Payroll Online Tool (SPOT)**Enter an Earnings Transaction in SPOT**

1. Navigate to the **Enter SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

Enter SPOT Transactions
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Company

begins with

Q

Pay Group

begins with

Q

Pay Period End Date

=

Q

Transaction Type

=

▼

Batch Identity

begins with

Batch Status

=

▼

Created By

begins with

Q


☐ Case Sensitive
Limit the number of results to (up to 300):

300

Search

Clear

Basic Search

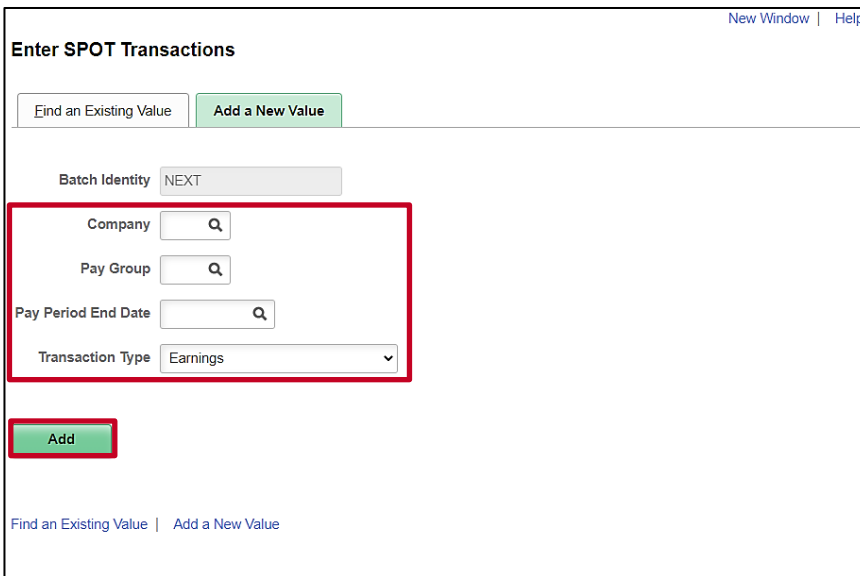
 Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

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The **Add a New Value** tab displays.



Enter SPOT Transactions [New Window](#) | [Help](#)

[Find an Existing Value](#) [Add a New Value](#)

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

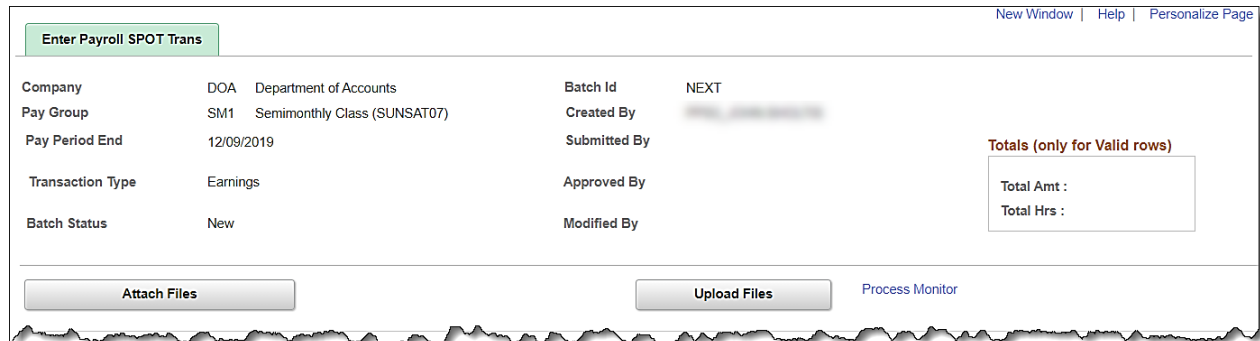
The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s).
Pay Period End Date	Select the appropriate transaction's pay period end date (the pop-up window will only show pay periods that have not been confirmed).
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). Deductions – deduction overrides, extra deductions or deduction refunds.

- Enter/select the appropriate values in the **Company**, **Pay Group**, **Pay Period End Date**, and **Transaction Type** fields.
- Click the **Add** button.

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The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:

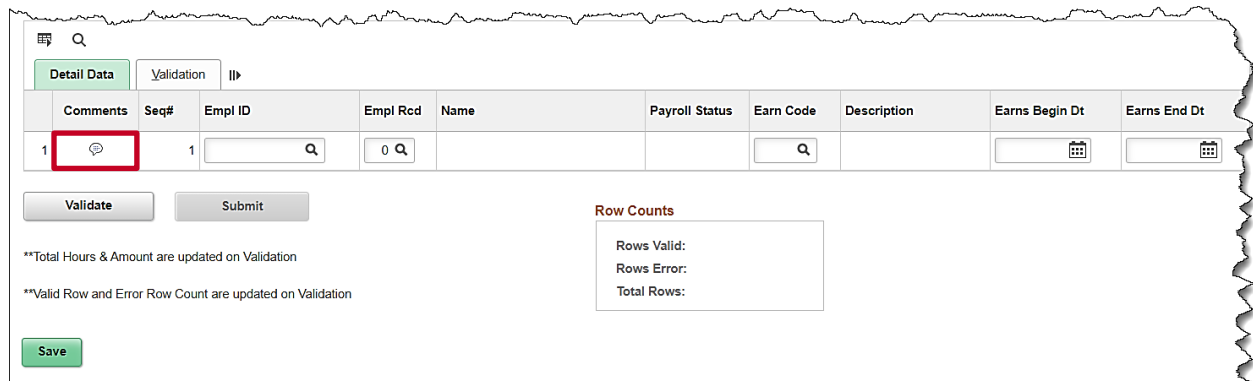
Field	Description
Batch Status	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> • New – when a new batch is initiated. • Created – when the batch is saved. • Validated – when the batch is validated. • Modified after Validation – when the batch is changed after validation • Submitted – when the batch is submitted for approval. • In Review – when the approver is reviewing the batch for approval. • Closed – after the approver has submitted the batch to payroll.
Batch ID	Defaults to “ NEXT ”; automatically updates when the batch is submitted.
Created By	Displays the name of the Payroll Administrator who created the batch.
Submitted By	Displays the name of the Payroll Administrator who submitted the batch.
Approved By	Displays the name of the SPOT approver who approved the batch.

Note: For further information on the **Attach Files** and **Upload Files** buttons, see the **Spreadsheet Upload** section of this Job Aid.


5. Scroll down to the **Detail Data** and **Validation** tabs below the Header section.

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The **Detail Data** tab displays by default.



Detail Data | Validation | II>

Comments	Seq#	Empl ID	Empl Recd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1 	1	<input type="text"/>	<input type="text"/>			<input type="text"/>		<input type="text"/>	<input type="text"/>

Validate Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Row Counts

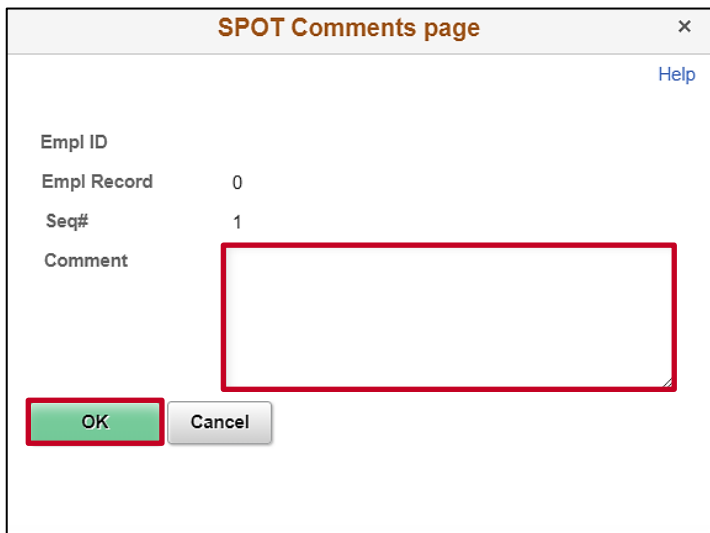
Rows Valid:
Rows Error:
Total Rows:

Note: Use the scroll bar at the bottom of the page to move left/right as required.

- The **Detail Data** tab is used for one-time transactions.
- The **Validation** tab is used to view the status of validated transactions.

6. Click the **Comments** bubble.

The **SPOT Comments** page displays in a pop-up window.



SPOT Comments page ×

Help

Empl ID

Empl Record 0

Seq# 1

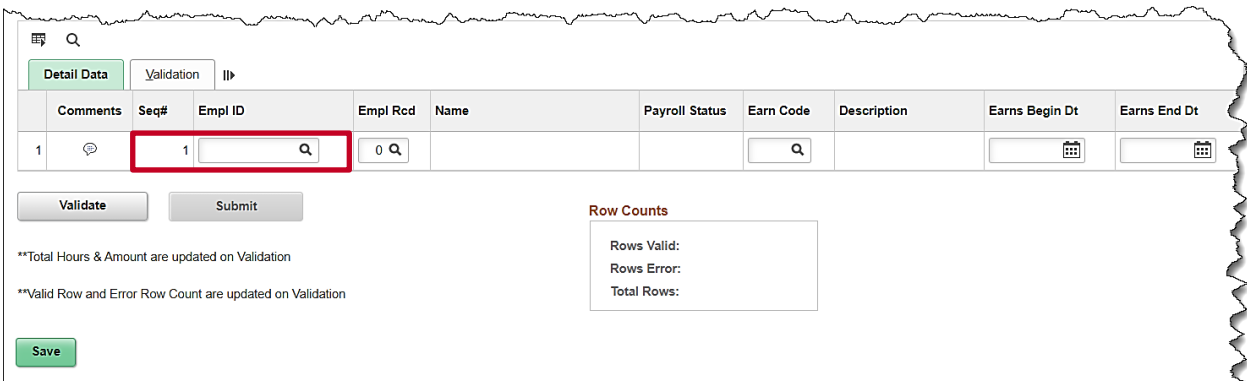
Comment

OK Cancel

- Enter any applicable comments in the **Comment** field, as required.
- Click the **OK** button.

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The Detail Data tab returns.



Detail Data Validation

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1	<input type="text" value=""/>	0						

Validate Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Row Counts

Rows Valid:

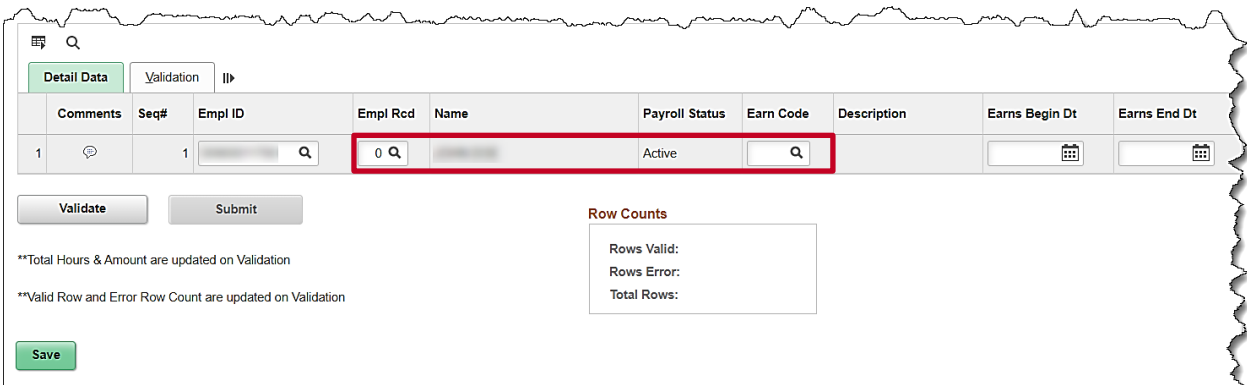
Rows Error:

Total Rows:

9. The **Seq#** field auto-populates and is read-only.

10. Enter/select the appropriate Employee ID using the **Empl ID** field look-up icon.

The **Detail Data** tab refreshes.



Detail Data Validation

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt
1	1	<input type="text" value=""/>	0		Active				

Validate Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Row Counts

Rows Valid:

Rows Error:

Total Rows:

11. Enter/select the applicable Empl Rcd as required using the **Empl Rcd** field look-up icon.

12. Verify the auto-populated Name in the **Name** field.

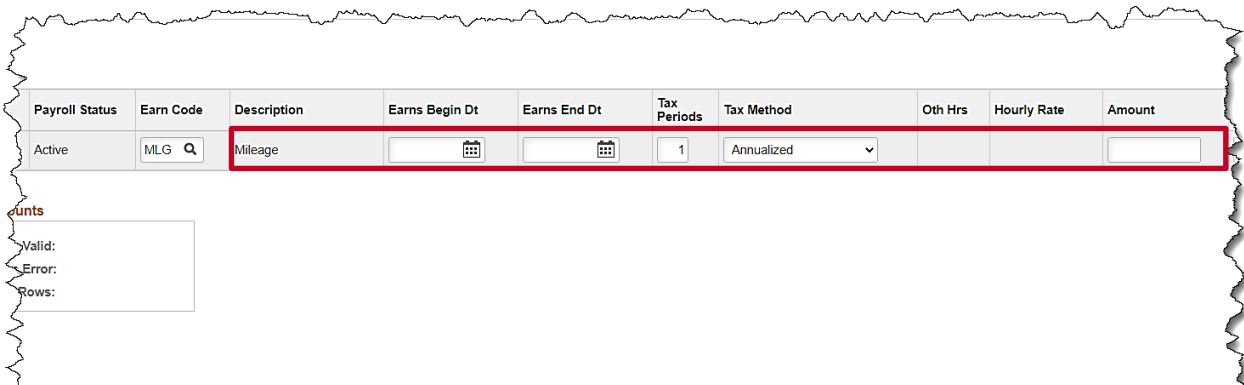
13. Verify the Payroll Status in the **Payroll Status** field.

Note: A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is **“Terminated”**.

14. Enter/select the appropriate Earnings Code using the **Earn Code** field look-up icon.

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The **Detail Data** tab refreshes.



Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount
Active	MLG	Mileage			1	Annualized			

Valid:
Error:
Rows:

15. Verify the **Description** field correctly auto-populated based off the selected Earnings Code.
16. If the earnings apply to a prior pay period, enter the appropriate Earnings Beginning and End Dates using the **Earns Begin Dt** and **Earns End Dt** calendar icons.
17. The **Tax Periods** field defaults to “1” and refers to the number of pay periods covered by the earnings payment.

Note: The Tax Periods field is used in conjunction with the annualized tax method.

18. Select the appropriate Tax Method using the **Tax Method** field drop-down menu.

Note: Annualized and Supplemental are the most frequently used tax methods. The Annualized Tax Method multiplies the earnings by the pay periods and taxed based upon the annualized amount. (The **Tax Period** field impacts how the earnings are annualized). The Supplemental Tax Method is most often used for bonus payments.

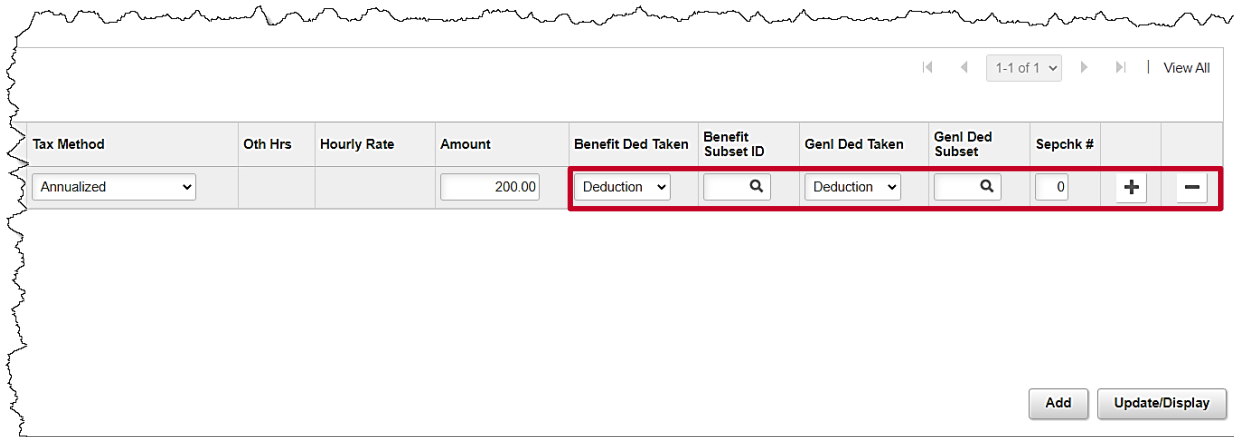
19. Enter the applicable hours in the **Oth Hrs** field to one decimal place (e.g., 8.0).
20. Enter the applicable hourly rate in the **Hourly Rate** field to two decimal places (e.g., 22.55).
21. Enter the applicable amount in the **Amount** field to two decimal places (e.g., 200.00). The amount can be a positive or negative number, based upon the value selected in the **Earn Code** field.

Note: The **Oth Hrs**, **Hourly Rate**, and **Amount** fields are available only if applicable based upon the value selected in the **Earn Code** field.

22. Scroll to the right, as required.

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The remaining fields on the **Detail Data** tab display.



Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
Annualized			200.00	Deduction	Q	Deduction	Q	0	+	-

Add Update/Display

23. Select the appropriate value from the **Benefit Ded Taken** drop-down menu.

- Deduction** – all benefit deductions are taken from the earnings
- None** – no benefit deductions are taken from the earnings
- Subset** – a subset of benefit deductions are taken from the earnings

Note: A Benefit Subset ID value must be selected in the **Benefit Subset ID** field if the “**Subset**” value is selected in the **Benefit Ded Taken** field. If “**Subset**” was not selected, do not select a value in the **Benefit Subset ID** field and skip to step 25.

24. Enter/select a value using the **Benefit Subset ID** field look-up icon.

- BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings
- GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken
- SPT** (SPOT Allow) – Not used by Cardinal
- LVS** (Leave Share) – All deductions will be taken from the earnings

25. Select a value from the **Genl Ded Taken** field drop-down menu.

- Deduction** – all benefit deductions are taken from the earnings
- None** – no benefit deductions are taken from the earnings
- Subset** – a subset of benefit deductions are taken from the earnings

Note: A General Deduction Subset value must be selected in the **Gen Ded Subset** field if the “**Subset**” value is selected in the **Genl Ded Taken** field. If “**Subset**” was not selected, do not select a value in the **Gen Ded Subset** field and skip to step 28.

26. Enter/select a value using the **Gen Ded Subset** field look-up icon.

- BNS** (Bonus) – Annuity and Deferred Compensation deductions will be taken from the earnings
- GRN** (Garnishment Only) – Garnishment and Garnishment fee deductions will be taken
- SPT** (SPOT Allow) – Not used by Cardinal
- LVS** (Leave Share) – All deductions will be taken from the earnings

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27. Update the **Sepchk#** field, as necessary. The **Sepchk#** field defaults to “0”, indicating the earnings will be added to the employee’s next check. Incrementally update this field incrementally by one if the employee requires a separate check(s).

Note: The **Benefit Deduction Taken** and **General Ded Taken** fields are required if the **Sepchk#** field is updated with any number except “0”.

28. Click the **Add a Row** icon (+) to add an additional item. Repeat steps 5 – 28 until all SPOT earnings transactions are added.

29. Click the **Delete a Row** icon (-) to delete a line.

Note: Submit a help desk ticket to delete a line that has already been saved.

30. Scroll to the left, as required.

Enter Payroll SPOT Trans

Company

DOA Department of Accounts

Batch Id

NEXT

Pay Group

SM1 Semimonthly Class (SUNSAT07)

Created By

Pay Period End

12/09/2019

Submitted By

Transaction Type

Earnings

Approved By

Batch Status

New

Modified By

Totals (only for Valid rows)

Total Amt :

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	

Validate

Submit

Row Counts

Rows Valid:

Rows Error:

Total Rows:

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

31. Click the **Save** button.

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The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company

DOA Department of Accounts

Batch Id

10

Pay Group

SM1 Semimonthly Class (SUNSAT07)

Created By

Pay Period End

12/09/2019

Submitted By

Transaction Type

Earnings

Approved By

Batch Status

Created

Modified By

Totals (only for Valid rows)

Total Amt :

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

II>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	

Validate

Submit

Row Counts

Rows Valid:

Rows Error:

Total Rows:

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

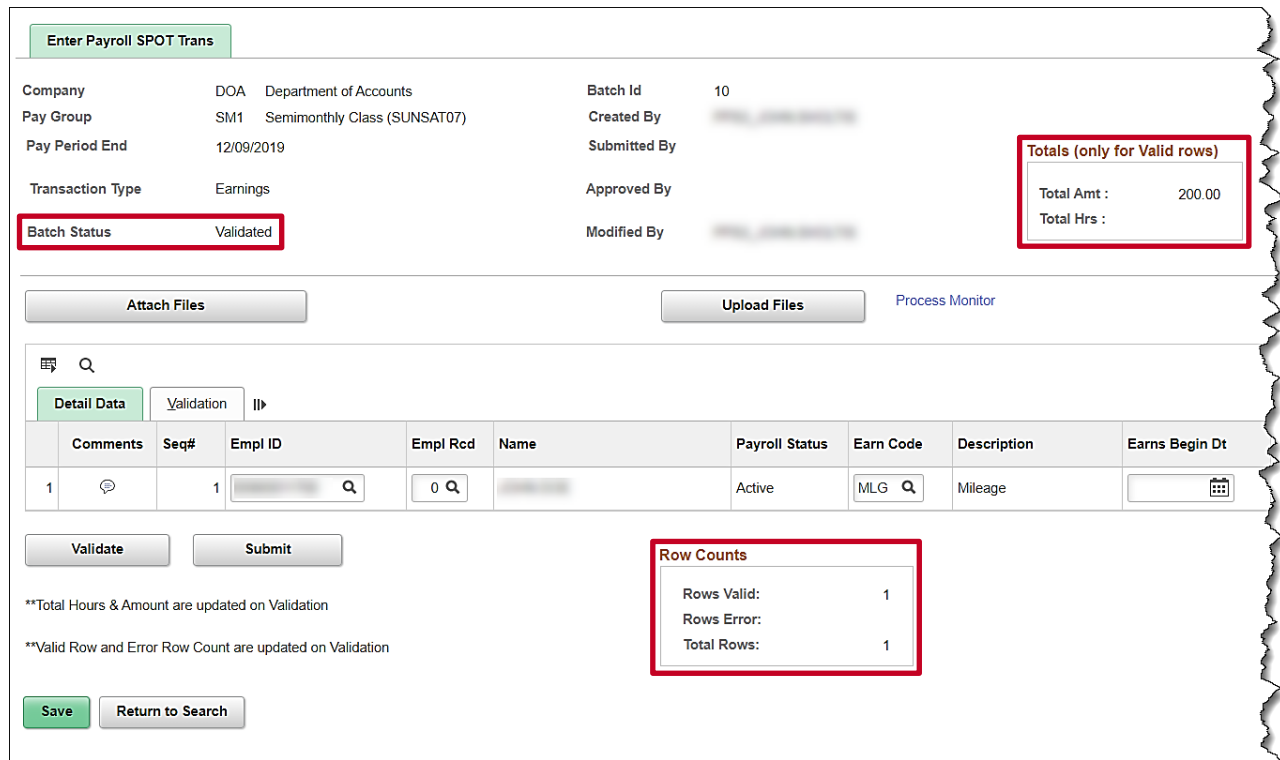
Return to Search

Note: After a batch is saved, additional items can still be added as necessary.

32. Verify the **Batch ID** field populates with a number (“**10**” in the example above).
33. Verify the **Batch Status** field updates to “**Created**”.
34. Click the **Validate** button to validate individual fields as well as combinations of fields.

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The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 10
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [Redacted]
 Pay Period End: 12/09/2019 Submitted By: [Redacted]
 Transaction Type: Earnings Approved By: [Redacted]
 Modified By: [Redacted]

Batch Status: Validated

Totals (only for Valid rows)

Total Amt :	200.00
Total Hrs :	

Buttons: Attach Files, Upload Files, Process Monitor

Detail Data | Validation | II>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1	[Redacted]	0	[Redacted]	Active	MLG	Mileage	

Buttons: Validate, Submit

Row Counts

Rows Valid:	1
Rows Error:	
Total Rows:	1

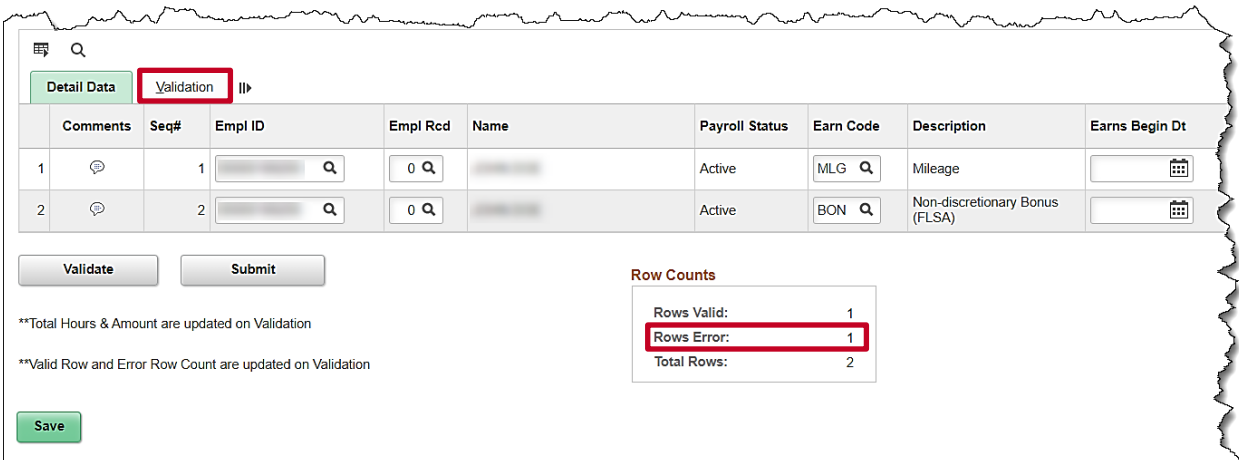
**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Buttons: Save, Return to Search

35. The **Batch Status** updates to **Validated**.
36. The **Totals (only for Valid rows)** section provides a summary of:
 - a. **Total Amt** – sum of the values entered in the **Amount** field for the batch
 - b. **Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch
37. The **Row Counts** section provides a summary of:
 - a. **Rows Valid** – the number of valid rows in the batch
 - b. **Rows Error** – the number or rows in the batch containing errors
 - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
38. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 49.

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The screenshot below provides an example of a batch that contains an error.



Detail Data **Validation** ||>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

Validate **Submit**

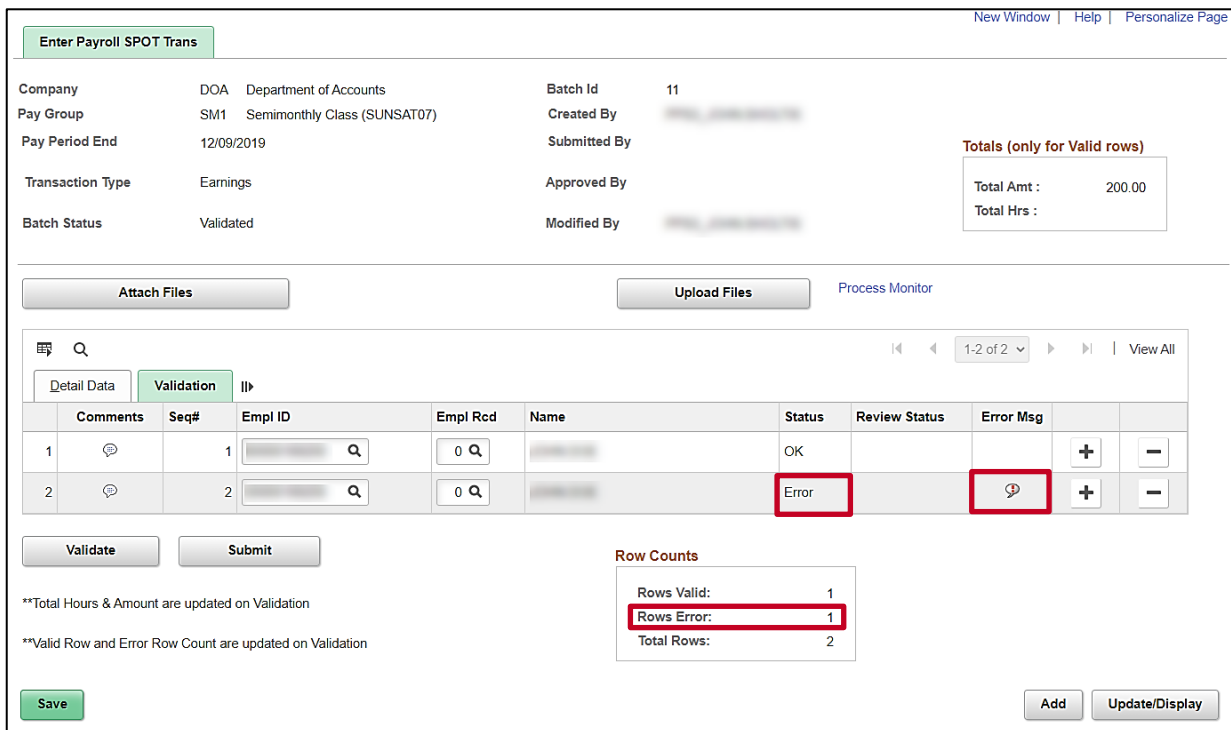
**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

39. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

The **Validation** tab displays.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 11

Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [User]

Pay Period End: 12/09/2019 Submitted By: [User]

Transaction Type: Earnings Approved By: [User]

Batch Status: Validated Modified By: [User]

Totals (only for Valid rows)

Total Amt : 200.00

Total Hrs :

Attach Files **Upload Files** [Process Monitor](#)

Detail Data **Validation** ||>

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1		0		OK			+	-
2		2		0		Error			+	-

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

Validate **Submit**

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save **Add** **Update/Display**

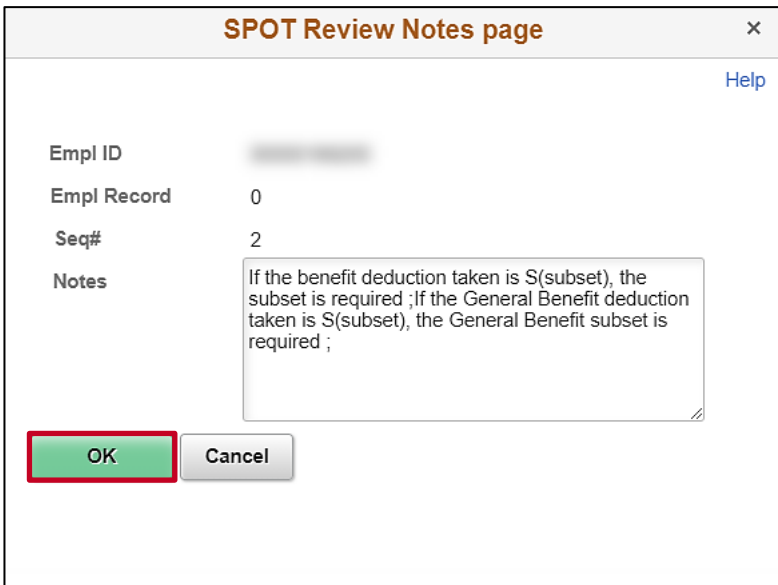
- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
- The **Status** field displays one of two statuses:
 - OK** – no errors
 - Error** – issue with line

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- If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.

40. Click the **Bubble** icon in the **Error Msg** field to view the error message.

The **SPOT Review Notes Page** pop-up window displays.

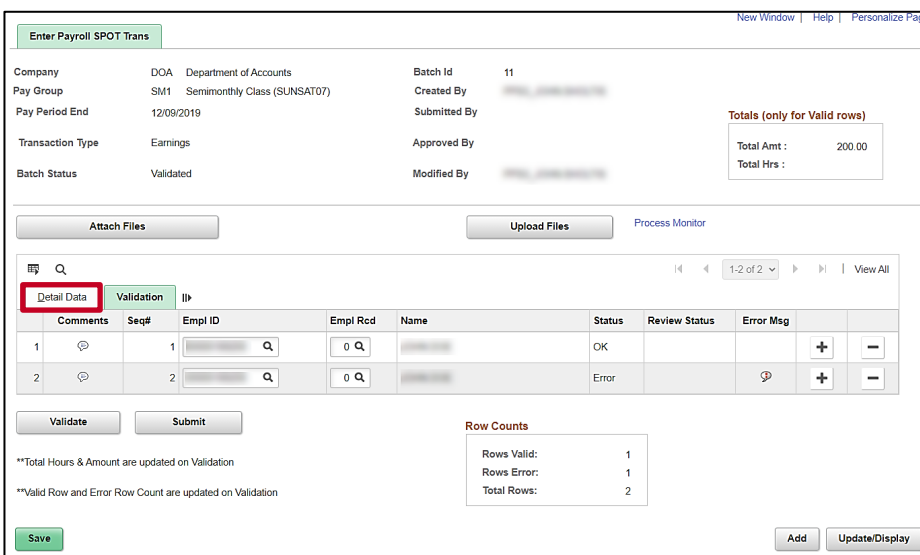


The SPOT Review Notes page pop-up window displays the following information:

- Empl ID**: [Redacted]
- Empl Record**: 0
- Seq#**: 2
- Notes**: If the benefit deduction taken is S(subset), the subset is required ;If the General Benefit deduction taken is S(subset), the General Benefit subset is required ;
- Buttons**: OK (highlighted with a red box), Cancel

41. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.



The Validation tab displays the following information:

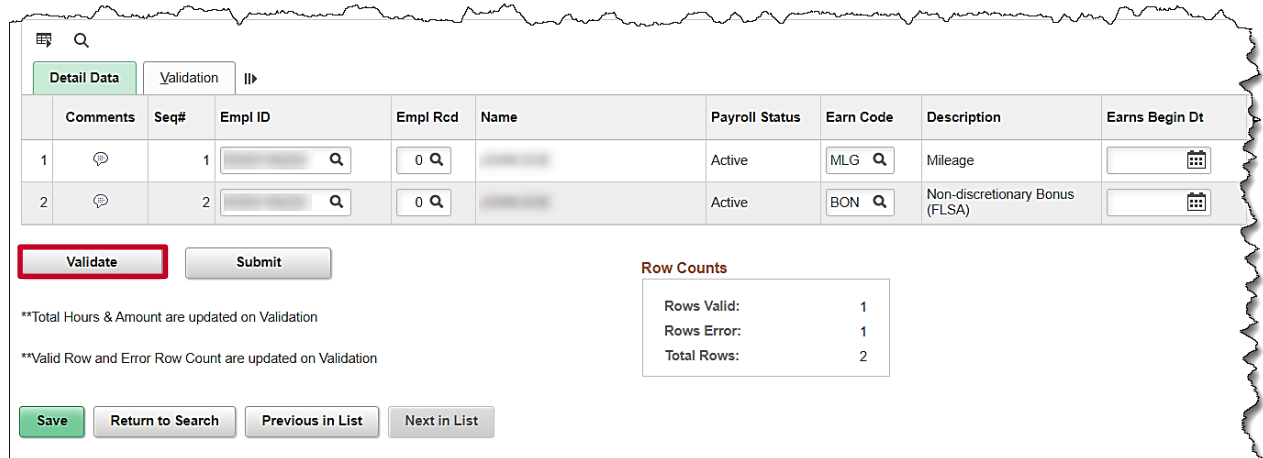
- Company**: DOA Department of Accounts
- Pay Group**: SM1 Semimonthly Class (SUNSAT07)
- Pay Period End**: 12/09/2019
- Transaction Type**: Earnings
- Batch Status**: Validated
- Batch Id**: 11
- Created By**: [Redacted]
- Submitted By**: [Redacted]
- Approved By**: [Redacted]
- Modified By**: [Redacted]
- Totals (only for Valid rows)**:
 - Total Amt : 200.00
 - Total Hrs :
- Buttons**: Attach Files, Upload Files, Process Monitor
- Detail Data Tab**: (highlighted with a red box)

Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
	1	[Redacted]	0	[Redacted]	OK			+	-
	2	[Redacted]	0	[Redacted]	Error			+	-
- Buttons**: Validate, Submit
- Row Counts**:
 - Rows Valid: 1
 - Rows Error: 1
 - Total Rows: 2
- Footnote**: **Total Hours & Amount are updated on Validation
- Footnote**: **Valid Row and Error Row Count are updated on Validation
- Buttons**: Save, Add, Update/Display

42. Click the **Detail Data** tab.

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The **Detail Data** tab returns.



	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Validate **Submit**

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save **Return to Search** **Previous in List** **Next in List**

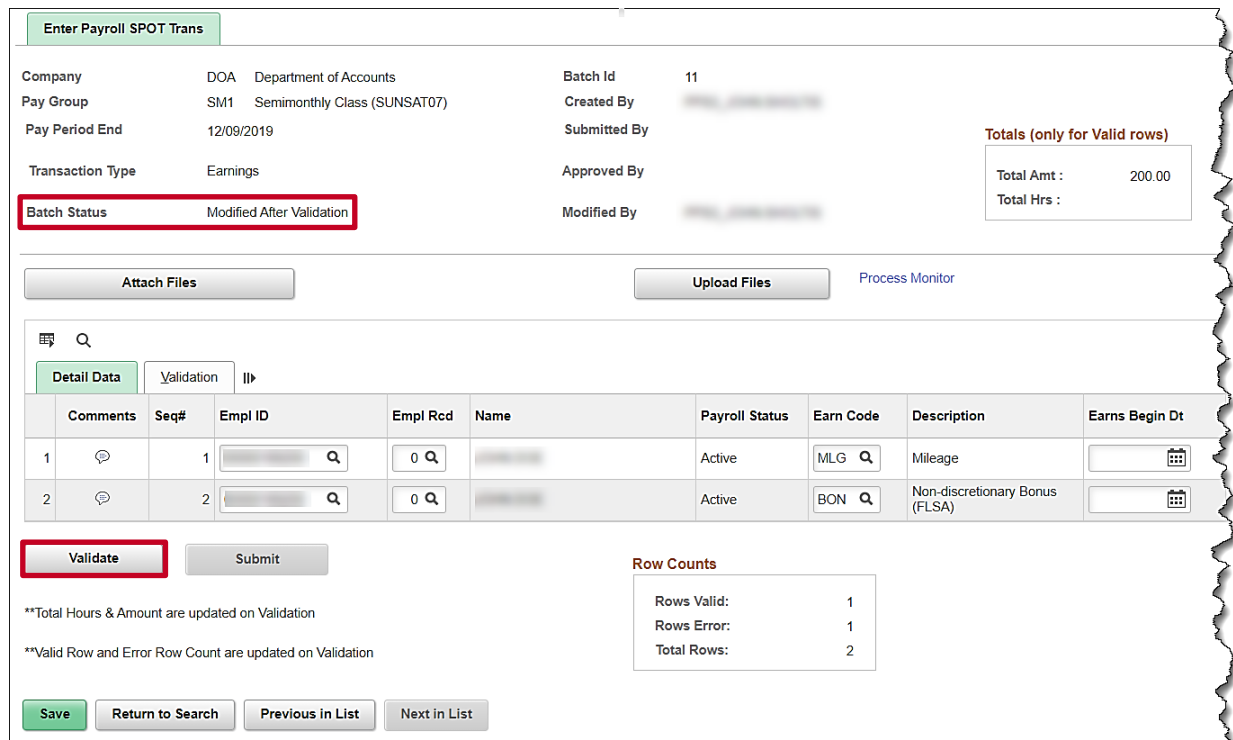
Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

43. Update the applicable fields to correct the identified errors.

44. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 11

Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [REDACTED]

Pay Period End: 12/09/2019 Submitted By: [REDACTED]

Transaction Type: Earnings Approved By: [REDACTED]

Batch Status: Modified After Validation Modified By: [REDACTED]

Totals (only for Valid rows)

Total Amt :	200.00
Total Hrs :	

Attach Files **Upload Files** [Process Monitor](#)

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Validate **Submit**

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save **Return to Search** **Previous in List** **Next in List**

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

45. Verify the **Batch Status** field updates to “**Modified After Validation**”.

46. Click the **Validate** button.

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The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

CompanyDOA Department of AccountsBatch Id11
Pay GroupSM1 Semimonthly Class (SUNSAT07)Created By
Pay Period End12/09/2019Submitted By
Transaction TypeEarningsApproved By
Batch StatusValidatedModified By

Totals (only for Valid rows)
Total Amt : 1200.00
Total Hrs :

Attach FilesUpload FilesProcess Monitor

Detail DataValidation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

ValidateSubmit

Row Counts
Rows Valid: 2
Rows Error:
Total Rows: 2

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

SaveReturn to SearchPrevious in ListNext in List

47. Verify the **Batch Status** field updates to “**Validated**”.
 48. Verify the **Rows Error** field is blank, indicating all errors have been fixed.
 49. Click the **Submit** button to submit the batch for review.
- A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)
Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

OKCancel

50. Click the OK button to submit the batch for review.
- Note:** A batch cannot be edited after it is submitted.

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The **Enter SPOT Transactions** page returns.

Enter Payroll SPOT Trans

Company

DOA Department of Accounts

Pay Group

SM1 Semimonthly Class (SUNSAT07)

Pay Period End

12/09/2019

Transaction Type

Earnings

Batch Status

Submitted

Batch Id

11

Created By

Submitted By

Approved By

Modified By

Totals (only for Valid rows)

Total Amt :

1200.00

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earn
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Validate

Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:

2

Rows Error:

Total Rows:

2

Save

Return to Search

Previous in List

Next in List

51. Verify the **Batch Status** field updates to “**Submitted**”.

52. Verify the **Submitted By** field updates to your information.

Enter a Deduction Transaction in SPOT

1. Navigate to the **Enter SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions

Enter SPOT Transactions
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Company

begins with ▼

Pay Group

begins with ▼

Pay Period End Date

= ▼

Transaction Type

= ▼

▼

Batch Identity

begins with ▼

Batch Status

= ▼

▼

Created By

begins with ▼


☐ Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

Basic Search

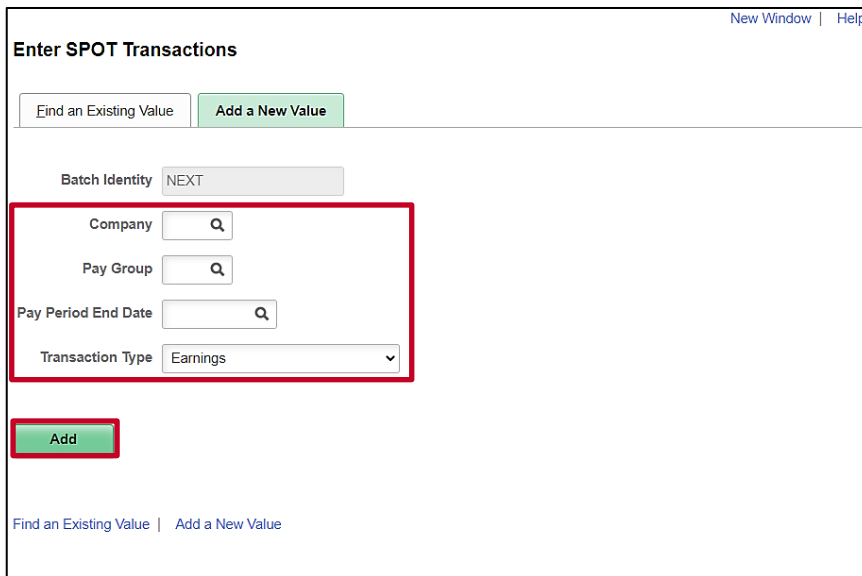
 Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

2. Click the **Add a New Value** tab.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Add a New Value** tab displays.



Enter SPOT Transactions [New Window](#) | [Help](#)

[Find an Existing Value](#) [Add a New Value](#)

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

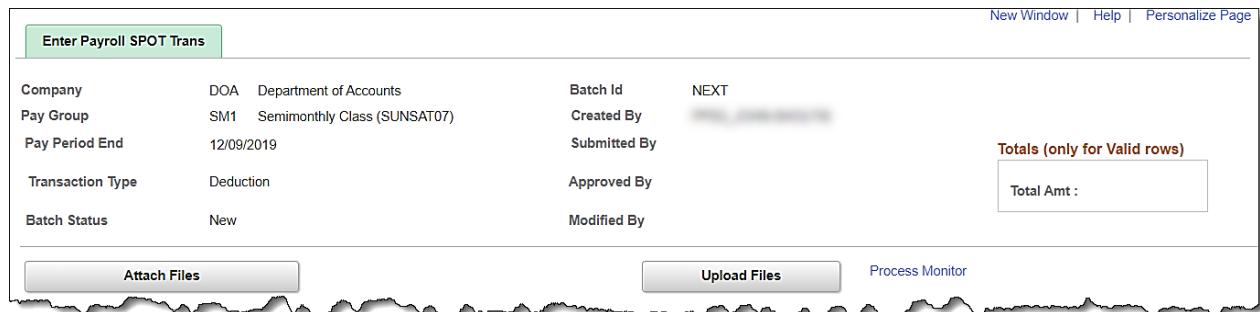
The following table provides a brief description of each field within the **Add a New Value** tab:

Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s).
Pay Period End Date	Select the appropriate transaction's pay period end date (the pop-up window will only show pay periods that have not been confirmed).
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). Deductions – deduction overrides, extra deductions or deduction refunds.

- Enter/select the appropriate values in the **Company**, **Pay Group**, and **Pay Period End Date** fields.
- Enter/select "**Deductions**" in the **Transaction Type** field.
- Click the **Add** button.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.



Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

The following table provides a brief description of additional fields included in the **Header** section of the **Enter Payroll SPOT Trans** tab:

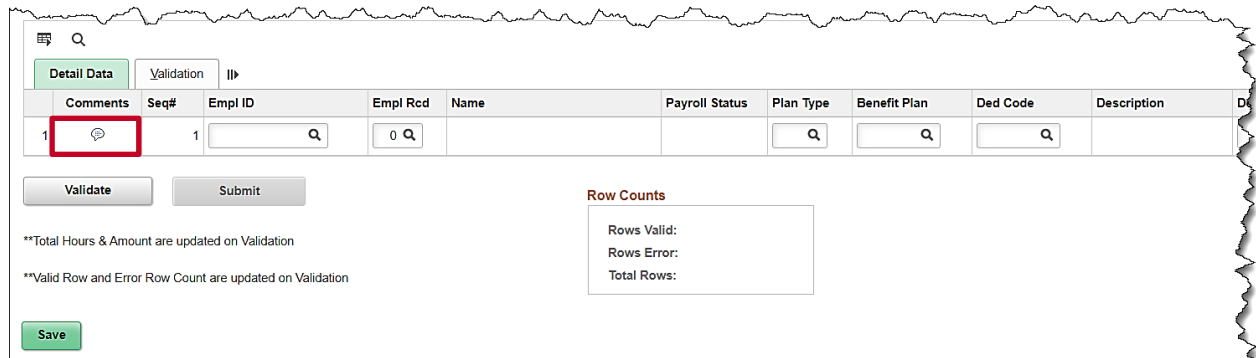
Field	Description
Batch Status	Updates based on actions taken to the batch. Batch statuses include: <ul style="list-style-type: none"> • New – when a new batch is initiated. • Created – when the batch is saved. • Validated – when the batch is validated. • Modified after Validation – when the batch is changed after validation • Submitted – when the batch is submitted for approval. • In Review – when the approver is reviewing the batch for approval. • Closed – after the approver has submitted the batch to payroll.
Batch ID	Defaults to “ NEXT ”; automatically updates when the batch is submitted.
Created By	Displays the name of the Payroll Administrator who created the batch.
Submitted By	Displays the name of the Payroll Administrator who submitted the batch.
Approved By	Displays the name of the SPOT approver who approved the batch.

Note: For further information on the **Attach Files** and **Upload Files** buttons, see the **Spreadsheet Upload** section of this Job Aid.

6. Scroll down to the **Detail Data** and **Validation** tabs below the Header section.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Detail Data** tab displays by default.

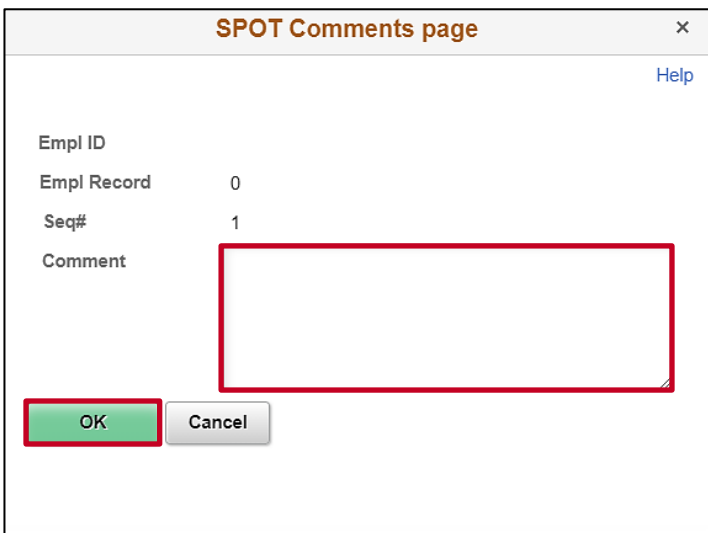


Note: Use the scroll bar at the bottom of the page to move left/right as required.

- a. The **Detail Data** tab is used for one-time transactions.
- b. The **Validation** tab is used to view the status of validated transactions

7. Click the **Comments** bubble.

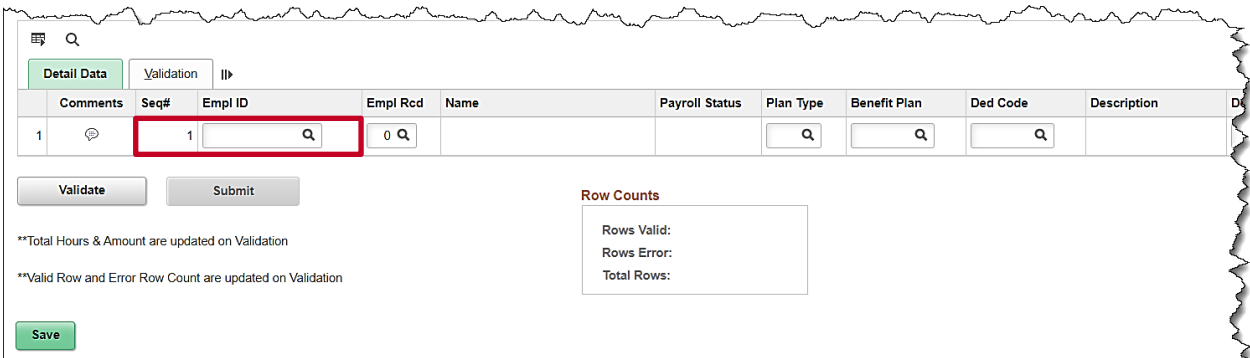
The **SPOT Comments** page displays in a pop-up window.



8. Enter any applicable comments in the **Comment** field, as required.
9. Click the **OK** button.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Detail Data** tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
1	1	<input type="text" value=""/>	0			<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	

Buttons: Validate, Submit, Save

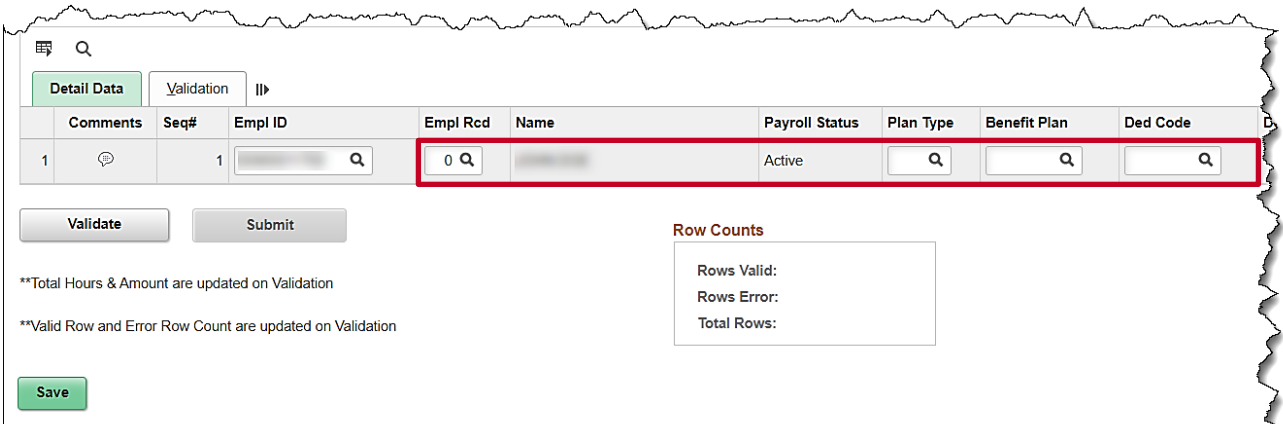
Row Counts:

- Rows Valid:
- Rows Error:
- Total Rows:

10. The **Seq#** field auto-populates and is read-only.

11. Enter/select the appropriate Employee ID using the **Empl ID** field look-up icon

The **Detail Data** tab refreshes.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code
1	1	<input type="text" value=""/>	0		Active	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Buttons: Validate, Submit, Save

Row Counts:

- Rows Valid:
- Rows Error:
- Total Rows:

12. Enter/select the applicable Employee Record as required using the **Empl Rcd** field look-up icon.

13. Verify the auto-populated Name in the **Name** field.

14. Verify the Payroll Status in the **Payroll Status** field.

Note: A Paysheet is created for pending SPOT transactions during the SPOT load if the Payroll Status is **"Terminated"**.


15. Enter/select the appropriate Plan Type using the **Plan Type** field look-up icon.

16. Enter/select the appropriate Benefit Plan using the **Benefit Plan** field look-up icon.

17. Enter/select the appropriate Deduction Code using the **Ded Code** field look-up icon.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Detail Data** tab refreshes.



Ded Code	Description	Ded Class	Ded Calc	Amount	One Time Cd		
OHPEN <input type="text"/>	Ofc of Health Benefit Penalty	<input type="text"/>	Amount <input type="text"/>	<input type="text"/>	Addition <input type="text"/>	+	-

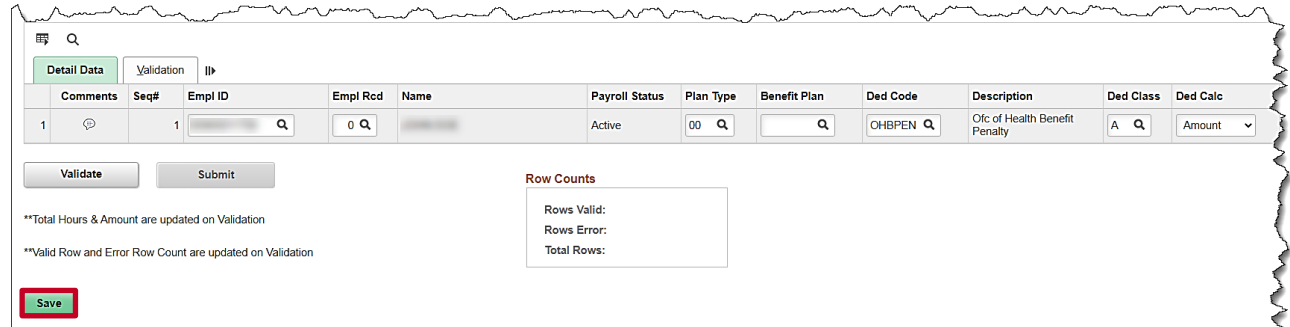
18. Verify the auto-populated Deduction Code Description in the **Description** field.
19. Select the appropriate Deduction Classification using the **Ded Class** field look-up icon. The following values are available, but only valid values for the Deduction Code display:
 - a. Before-Tax
 - b. After-Tax
 - c. Non-Taxable
 - d. Tax Ben
 - e. Taxable
20. Select the appropriate Deduction Calculation option using the **Ded Calc** drop-down menu.

Note: The option “**Amount**” is typically selected. Confirm with SPO prior to selecting any Deduction Calculation option other than “**Amount**”.
21. Enter the appropriate Deduction Amount to two decimal places (e.g., 200.00) in the **Amount** field. The Deduction Amount can be either a positive or negative number.
22. Select the appropriate One Time Code using the **One Time Cd** drop-down menu. The following options are available
 - a. Addition – Add to the current deduction(s)
 - b. Arrs Paybk – Not used by Cardinal
 - c. Override – Alter amount that would have been deducted
 - d. Refund – Amount due back to the employee; **DO NOT** enter a negative value in the **Amount** field if this option is selected
23. Click the **Add a Row** icon (+) to add an additional item. Repeat steps 5 – 28 until all SPOT earnings transactions are added.
24. Click the **Delete a Row** icon (-) to delete a line.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

Note: Submit a help desk ticket to delete a line that has already been saved.

25. Scroll to the left, as required.



Detail Data Validation II

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Calc
	1		0		Active	00		OHPEN	Ofc of Health Benefit Penalty	A	Amount

Validate Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:

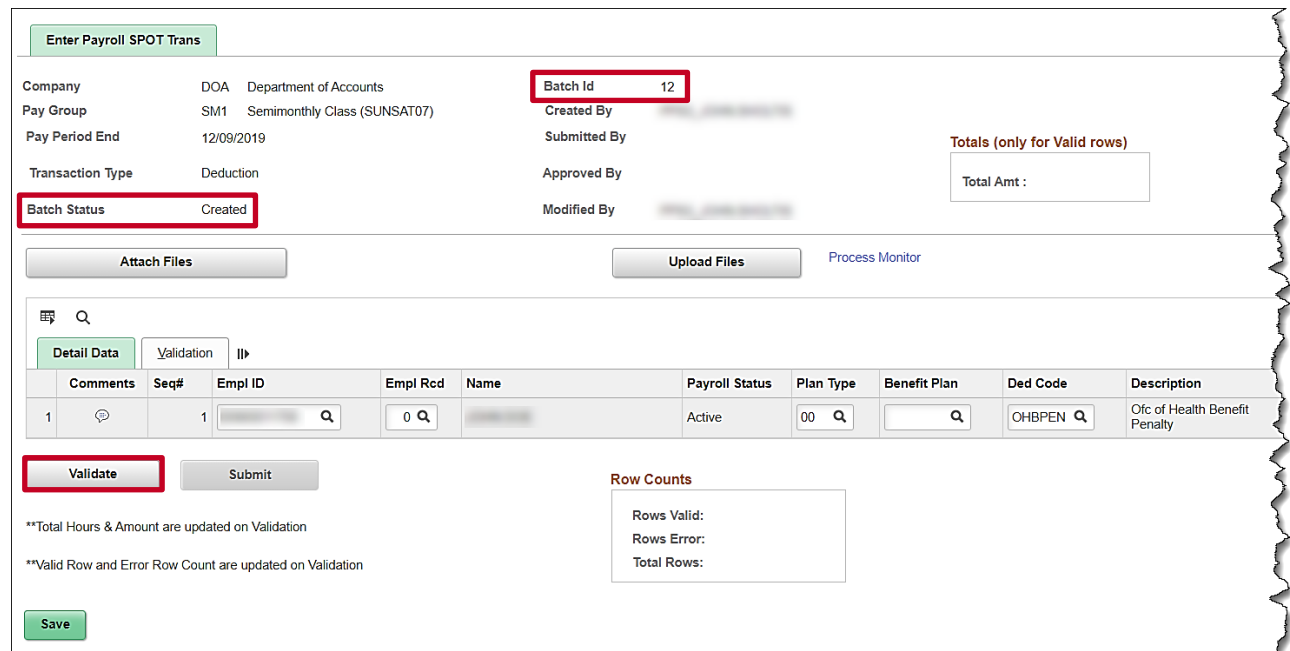
Rows Error:

Total Rows:

Save

26. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company DOA Department of Accounts Batch Id 12

Pay Group SM1 Semimonthly Class (SUNSAT07) Created By

Pay Period End 12/09/2019 Submitted By

Transaction Type Deduction Approved By

Batch Status Created Modified By

Totals (only for Valid rows)

Total Amt :

Attach Files Upload Files Process Monitor

Detail Data Validation II

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
	1		0		Active	00		OHPEN	Ofc of Health Benefit Penalty

Validate Submit

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Row Counts

Rows Valid:

Rows Error:

Total Rows:

Save

Note: After a batch is saved, additional items can still be added as necessary.

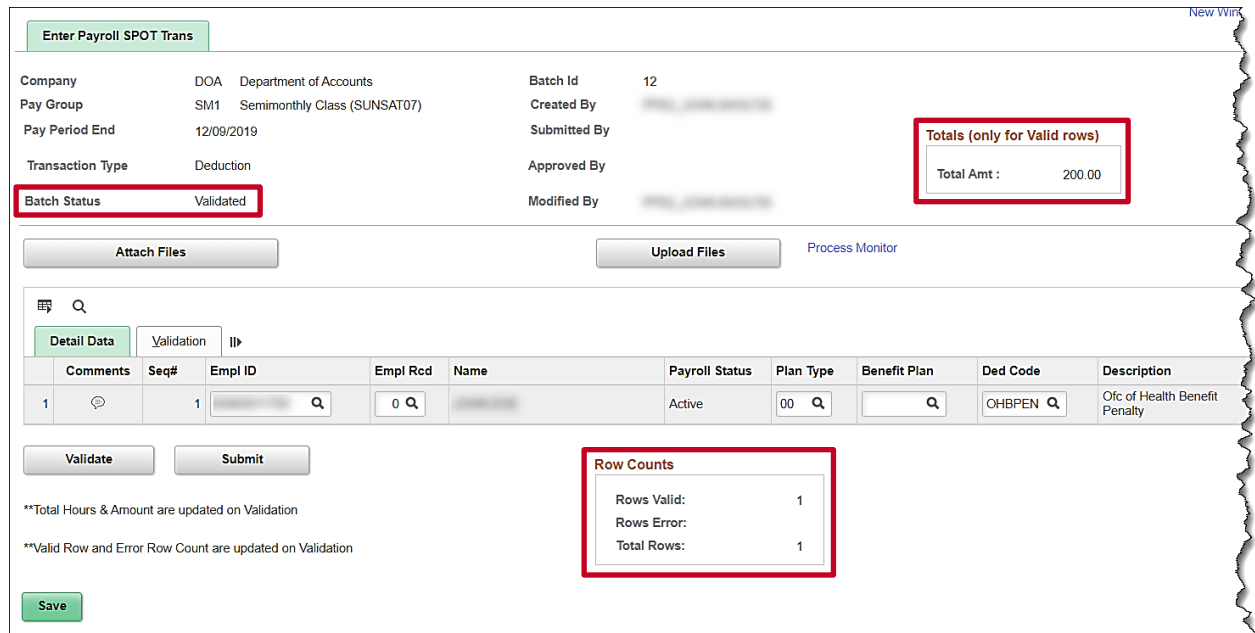
27. Verify the **Batch ID** field populates with a number (“12” in the example above).

28. Verify the **Batch Status** field updates to “Created”.

29. Click the **Validate** button to validate individual fields as well as combinations of fields.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 12
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [Redacted]
 Pay Period End: 12/09/2019 Submitted By: [Redacted]
 Transaction Type: Deduction Approved By: [Redacted]
 Batch Status: **Validated** Modified By: [Redacted]

Totals (only for Valid rows)
 Total Amt : 200.00

Attach Files Upload Files Process Monitor

Detail Data Validation II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description
	1	[Redacted]	0	[Redacted]	Active	00		OHPBEN	Ofc of Health Benefit Penalty

Validate Submit

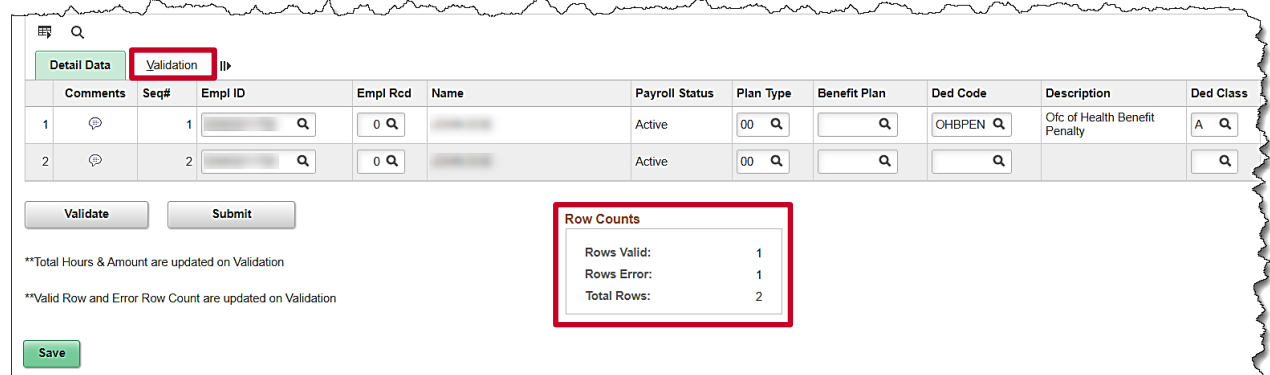
Row Counts
 Rows Valid: 1
 Rows Error: 0
 Total Rows: 1

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

30. Verify the **Batch Status** updated to **Validated**.
31. The **Totals (only for Valid rows)** section provides a summary of the sum of the values entered in the **Amount** field for the batch.
32. The **Row Counts** section provides a summary of:
 - a. **Rows Valid** – the number of valid rows in the batch
 - b. **Rows Error** – the number or rows in the batch containing errors
 - c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)
33. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 43.

The screenshot below provides an example of a batch that contains an error.



Detail Data **Validation** II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
	1	[Redacted]	0	[Redacted]	Active	00		OHPBEN	Ofc of Health Benefit Penalty	A
	2	[Redacted]	0	[Redacted]	Active	00				

Validate Submit

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

34. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Validation** tab displays.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company: DOA Department of Accounts
Pay Group: SM1 Semimonthly Class (SUNSAT07)
Pay Period End: 12/09/2019
Transaction Type: Deduction
Batch Status: Validated

Batch Id: 12
Created By: [Redacted]
Submitted By: [Redacted]
Approved By: [Redacted]
Modified By: [Redacted]

Totals (only for Valid rows)
Total Amt : 200.00

Attach Files

Upload Files

[Process Monitor](#)

Detail Data

Validation

II>

1-2 of 2

[View All](#)

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1	[Redacted]	0	[Redacted]	OK			+	-
2		2	[Redacted]	0	[Redacted]	Error			+	-

Validate

Submit

Row Counts
Rows Valid: 1
Rows Error: 1
Total Rows: 2

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Add

Update/Display

- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
 - The **Status** field displays one of two statuses:
 - **OK** – no errors
 - **Error** – issue with line
 - If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error.
35. Click the **Bubble** icon in the **Error Msg** field to view the error message.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Review Notes Page** pop-up window displays.

SPOT Review Notes page
×

[Help](#)

Empl ID 00900011700
 Empl Record 0
 Seq# 2
 Notes

Deduction Code not selected ;Deduction Class not selected ;

OK

Cancel

36. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company DOA Department of Accounts
 Pay Group SM1 Semimonthly Class (SUNSAT07)
 Pay Period End 12/09/2019
 Transaction Type Deduction
 Batch Status Validated

Batch Id 12
 Created By [REDACTED]
 Submitted By [REDACTED]
 Approved By [REDACTED]
 Modified By [REDACTED]

Totals (only for Valid rows)
 Total Amt : 200.00

Attach Files

Upload Files

[Process Monitor](#)

Detail Data

Validation

1-2 of 2 | View All

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1			[REDACTED] Q	0 Q	[REDACTED]	OK			+	-
2			[REDACTED] Q	0 Q	[REDACTED]	Error		P	+	-

Validate

Submit

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

Save

Add

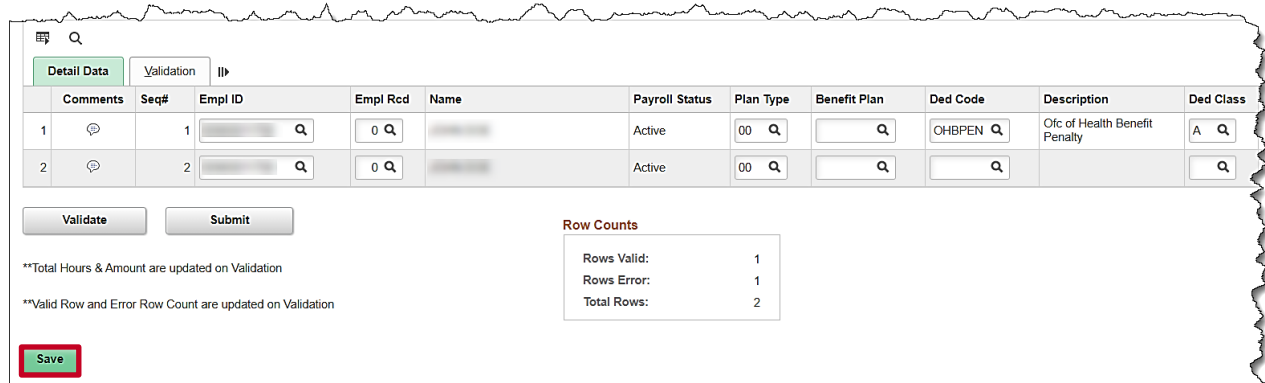
Update/Display

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Detail Data** tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
	1		0		Active	00		OHBPEN	Ofc of Health Benefit Penalty	A
	2		0		Active	00				

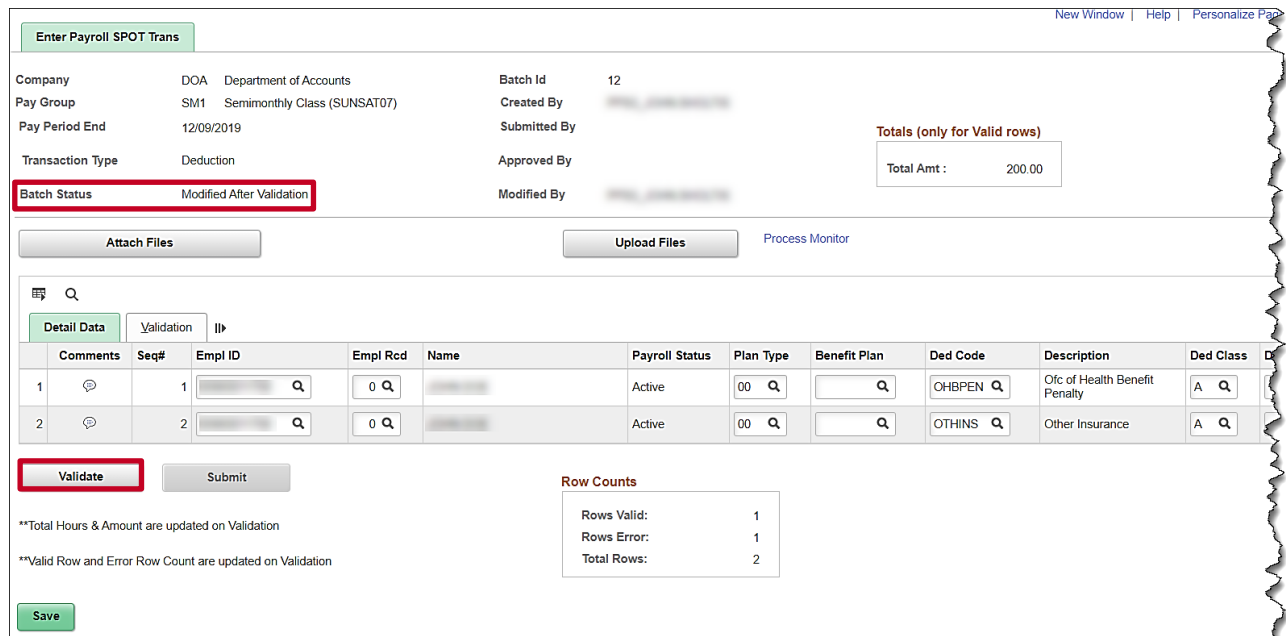
Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

37. Update the applicable fields to correct the identified errors.

38. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 12
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [redacted]
 Pay Period End: 12/09/2019 Submitted By: [redacted]
 Transaction Type: Deduction Approved By: [redacted]
 Batch Status: **Modified After Validation** Modified By: [redacted]

Totals (only for Valid rows)

Total Amt :	200.00
-------------	--------

Detail Data | Validation | II>

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
	1		0		Active	00		OHBPEN	Ofc of Health Benefit Penalty	A
	2		0		Active	00		OTHINS	Other Insurance	A

Row Counts

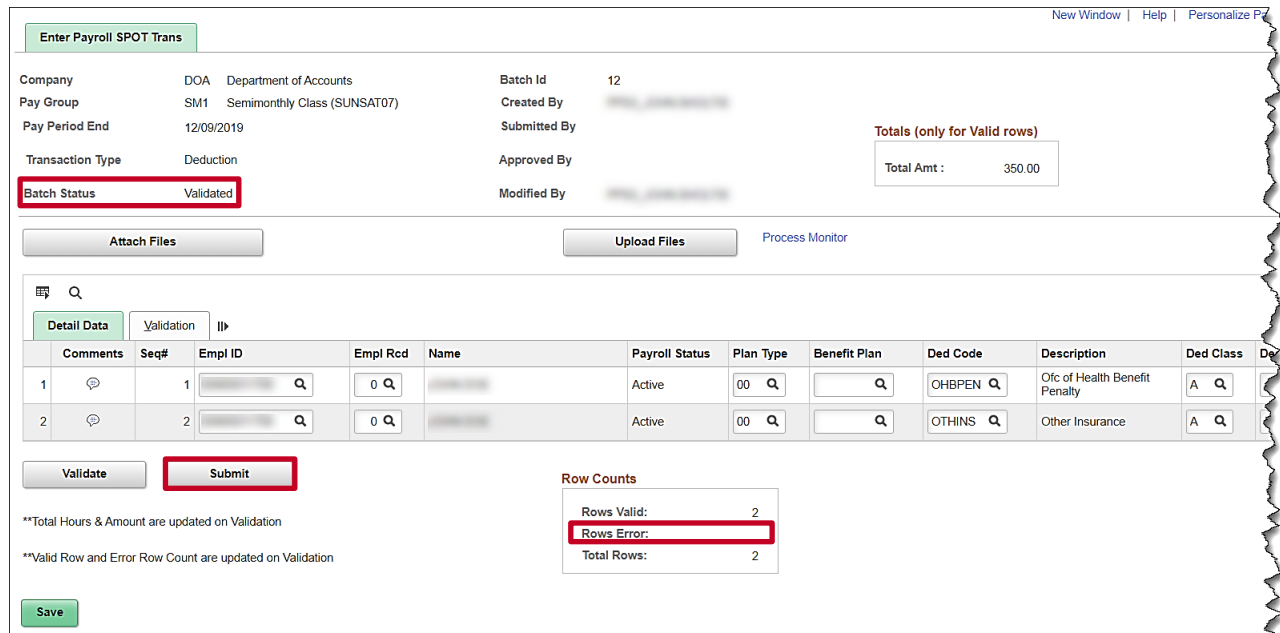
Rows Valid:	1
Rows Error:	1
Total Rows:	2

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

39. Verify the **Batch Status** field updates to "**Modified After Validation**".

40. Click the **Validate** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 12
 Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: [redacted]
 Pay Period End: 12/09/2019 Submitted By: [redacted]
 Transaction Type: Deduction Approved By: [redacted]
 Batch Status: **Validated** Modified By: [redacted]

Totals (only for Valid rows)
 Total Amt : 350.00

Attach Files Upload Files Process Monitor

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class
1	1	[redacted]	0	[redacted]	Active	00	[redacted]	OHBPEN	Ofc of Health Benefit Penalty	A
2	2	[redacted]	0	[redacted]	Active	00	[redacted]	OTHINS	Other Insurance	A

Validate **Submit**

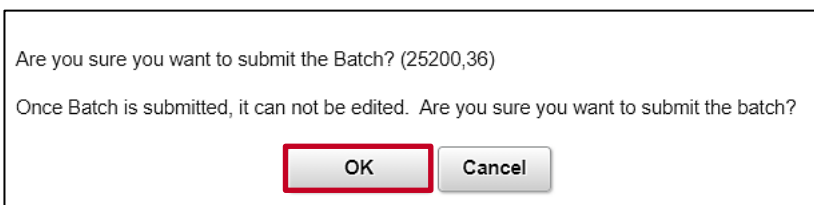
Row Counts
 Rows Valid: 2
Rows Error: 0
 Total Rows: 2

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

41. Verify the **Batch Status** field updates to “**Validated**”.
42. Verify the **Rows Error** field is blank, indicating all errors have been fixed.
43. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.



Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

OK Cancel

44. Click the **OK** button to submit the batch for review.

Note: A batch cannot be edited after it is submitted.



PY Job Aid

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Spot Transactions** page returns.

Enter Payroll SPOT Trans [New Window](#) [Help](#) [Personalize Page](#)

Company	DOA	Department of Accounts	Batch Id	12
Pay Group	SM1	Semimonthly Class (SUNSAT07)	Created By	[REDACTED]
Pay Period End	12/09/2019		Submitted By	[REDACTED]
Transaction Type	Deduction		Approved By	[REDACTED]
Batch Status	Submitted		Modified By	[REDACTED]

Totals (only for Valid rows)
Total Amt : 350.00

[Attach Files](#) [Upload Files](#) [Process Monitor](#)

[Detail Data](#) [Validation](#) [Filter](#)

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Ded Amt
1		1	[REDACTED]	0	[REDACTED]	Active	00		OHBPEN	Ofc of Health Benefit Penalty	A	Amo
2		2	[REDACTED]	0	[REDACTED]	Active	00		OTHINS	Other Insurance	A	Amo

[Validate](#) [Submit](#)

**Total Hours & Amount are updated on Validation
**Valid Row and Error Row Count are updated on Validation

Row Counts
Rows Valid: 2
Rows Error: 0
Total Rows: 2

[Save](#)

45. Verify the **Batch Status** field updates to “**Submitted**”.
46. Verify the **Submitted By** field updates to your information.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

SPOT Template Upload Process

The SPOT Template Upload process can be used to enter a large volume of transactions into SPOT. There are two Template Uploads:

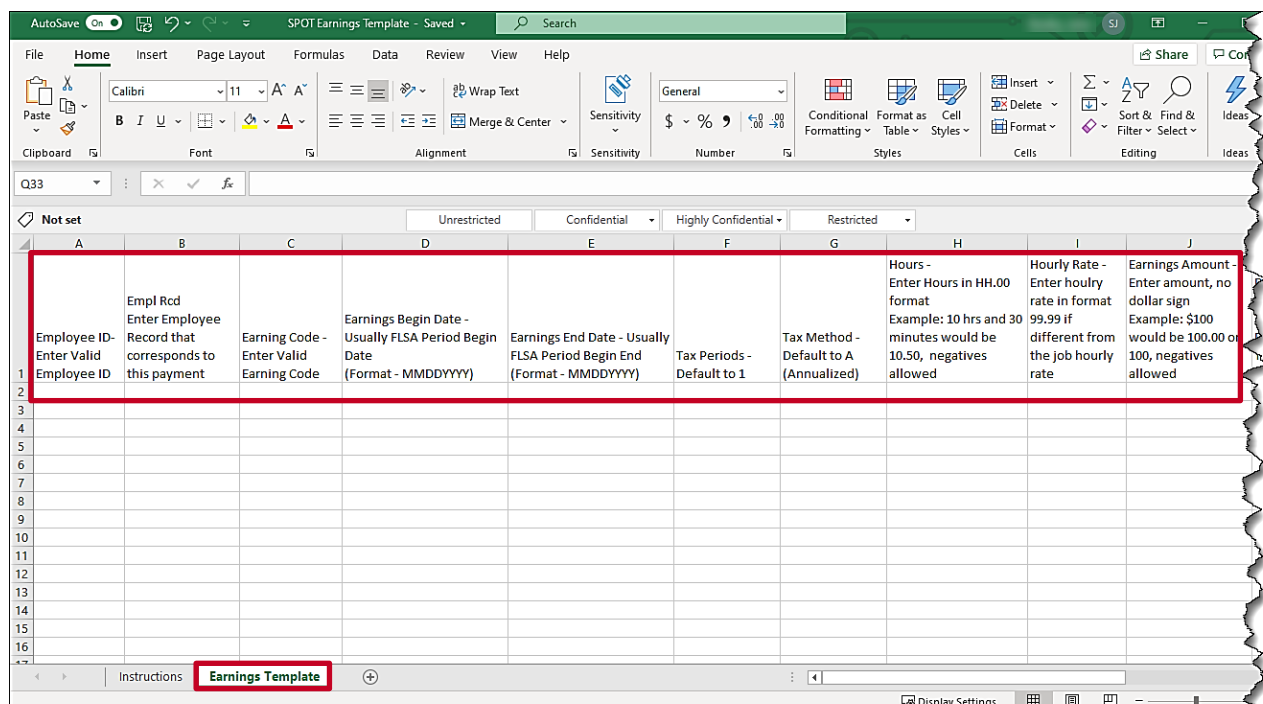
- Earnings
- Deductions

The templates are located on the Cardinal website.

Note: At this time, batches should not exceed more than 100 lines. If you have more than 100 lines to upload you will need to upload it as a separate batch.

1. Download and open the appropriate SPOT Upload Template. (The **SPOT Earnings Template** file is used in this example).

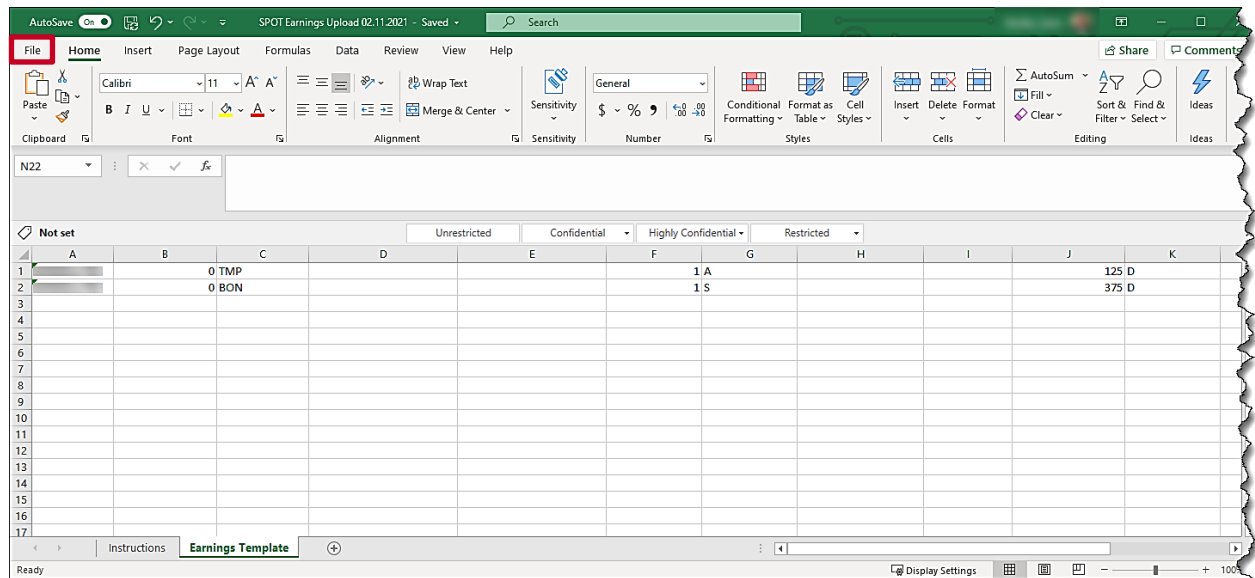
The **SPOT Earnings [or Deductions] Template** opens with the **Earnings [or Deductions] Template** workbook displayed by default.



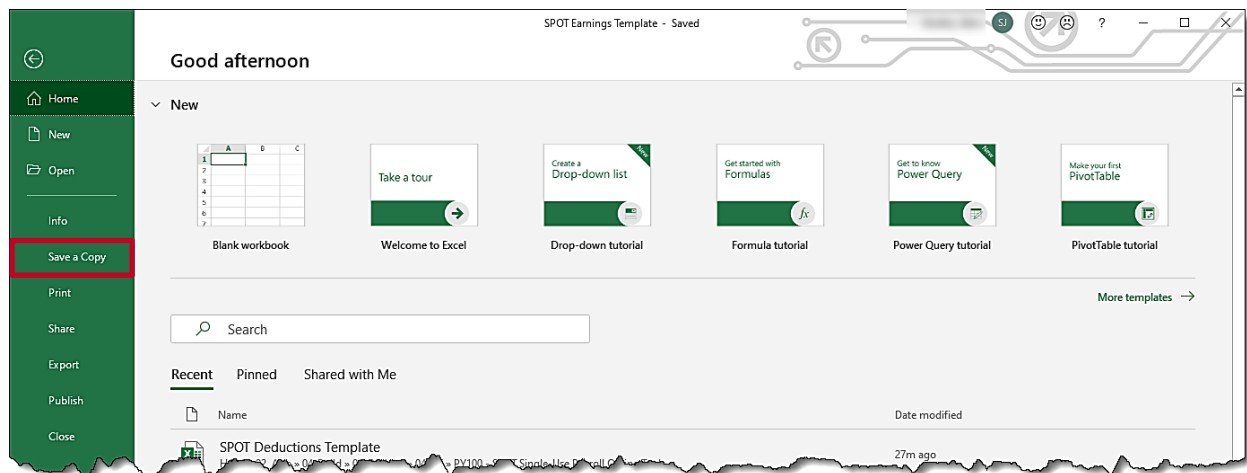
2. Click the **Earnings [or Deductions] Template** workbook if it is not displayed by default.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

- Click the **Delete** option from the drop-down menu to delete the entire **Header** row.



- Click the **File** button from the Ribbon.

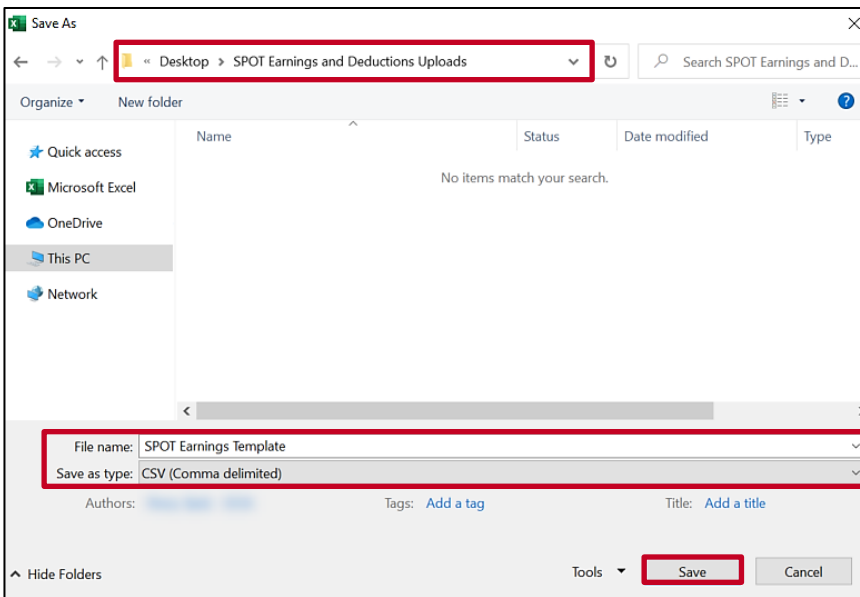


- Click the **Save a Copy** or **Save As** button.

Note: The button name depends upon the version of Microsoft Excel and personalized settings loaded on your computer, but the functionality is the same.

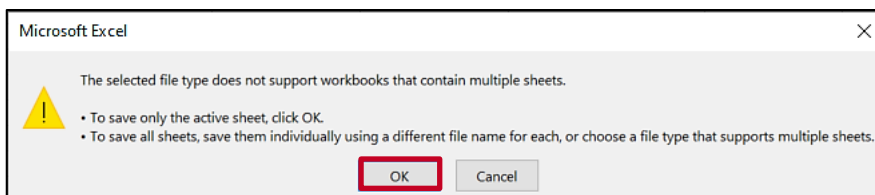
PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Save As** pop-up window displays.



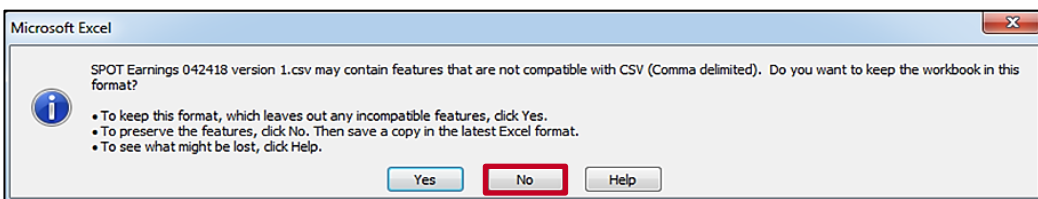
8. Select a destination using the Save Destination drop-down menu.
9. Enter a unique name for the file in the **File name** field.
10. Select **CSV (Comma Delimited)** from the **Save as type** drop-down menu.
11. Click the **Save** button.

A **Microsoft Excel Warning Message** displays.



12. Click the **OK** button.

A second **Microsoft Excel Warning Message** displays.



13. Click the **No** button.

Note: The file is now saved and ready to be uploaded.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

14. Navigate to the **Enter SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Process USA > Create and Load Paysheets > Enter SPOT Transactions

Enter SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

Search Criteria

Company

Pay Group

Pay Period End Date

Transaction Type

Batch Identity

Batch Status

Created By

☐ Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)
[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

15. Click the **Add a New Value** tab.

Enter SPOT Transactions

[New Window](#) | [Help](#)

[Find an Existing Value](#)
[Add a New Value](#)

Batch Identity

Company

Pay Group

Pay Period End Date

Transaction Type

[Find an Existing Value](#) | [Add a New Value](#)

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The following table provides a brief description of each field within the **Add a New Value** tab:

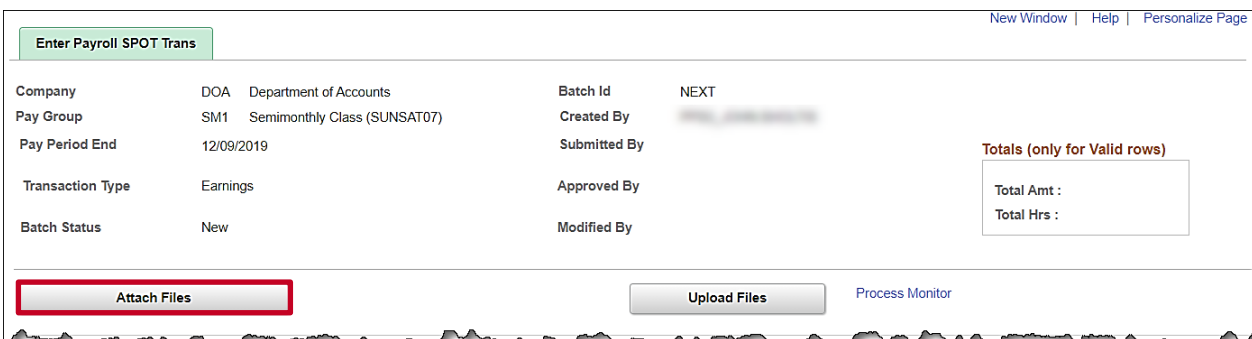
Field	Description
Batch Identity	Defaults to NEXT . This number will automatically generate when the batch is saved.
Company	Select your company. If you have access to enter transactions for multiple companies, select the appropriate company.
Pay Group	Select the appropriate employee(s) pay group(s).
Pay Period End Date	Select the appropriate transaction's pay period end date (the pop-up window will only show pay periods that have not been confirmed).
Transaction Type	Select the appropriate type of transaction. <ul style="list-style-type: none"> • Earnings – earnings in addition to time and labor or additional pay (typically one time or amounts that vary from pay period to pay period). • Deductions – deduction overrides, extra deductions or deduction refunds.

16. Enter/select the appropriate values in the **Company**, **Pay Group**, **Pay Period End Date**, and **Transaction Type** fields.

Note: This Job Aid shows an **Earnings** transaction, but there is no difference between an **Earnings** and **Deductions** transaction through the mass upload technique.

17. Click the **Add** button.

The **Enter SPOT Transactions** page refreshes with the **Enter Payroll SPOT Trans** tab displayed.

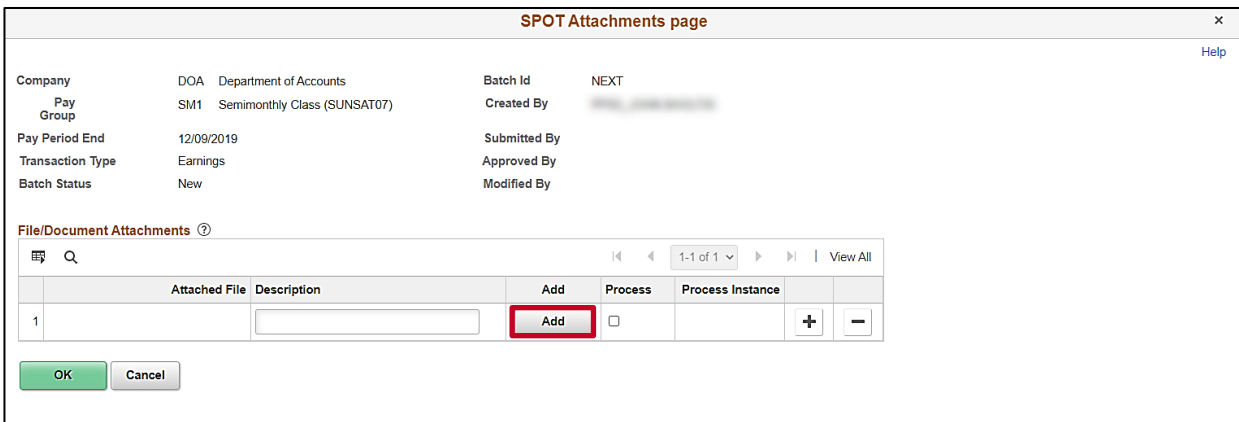


Note: The **Header** section populates with the information previously entered on the **Add a New Value** tab.

18. Click the **Attach Files** button.

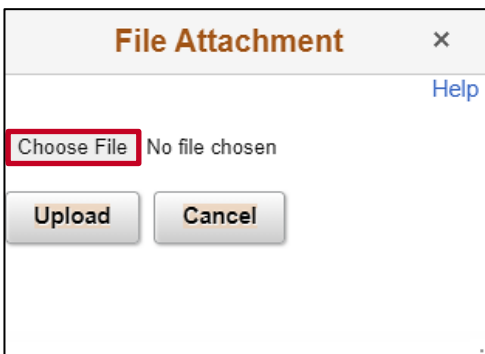
PY381 Using the Single-Use Payroll Online Tool (SPOT)

19. The **SPOT Attachments** page pop-up window displays.



20. Click the **Add** button.

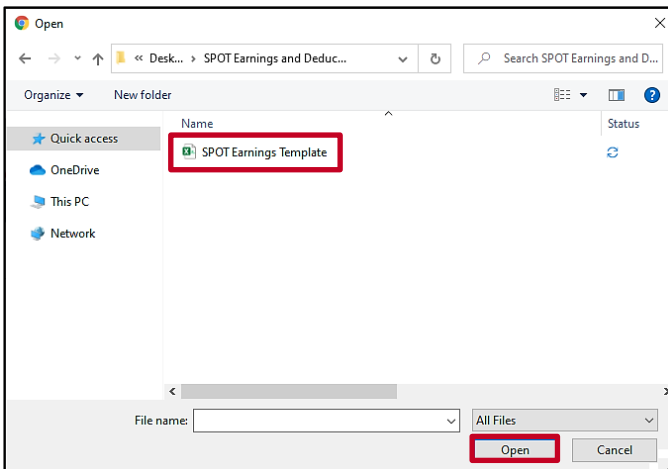
The **File Attachment** page displays in a pop-up window.



21. Click the **Choose File** button.

Note: Depending on the browser used, a **Browse** button may appear in place of the **Choose File** button.

The **Open Files** pop-up window displays.

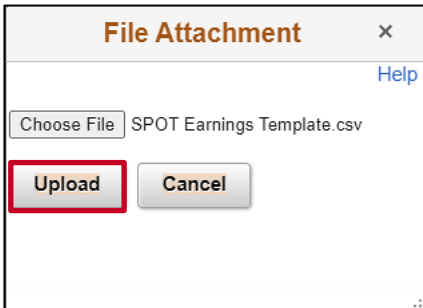


PY381 Using the Single-Use Payroll Online Tool (SPOT)

22. Navigate to and select the applicable file.

23. Click the **Open** button.

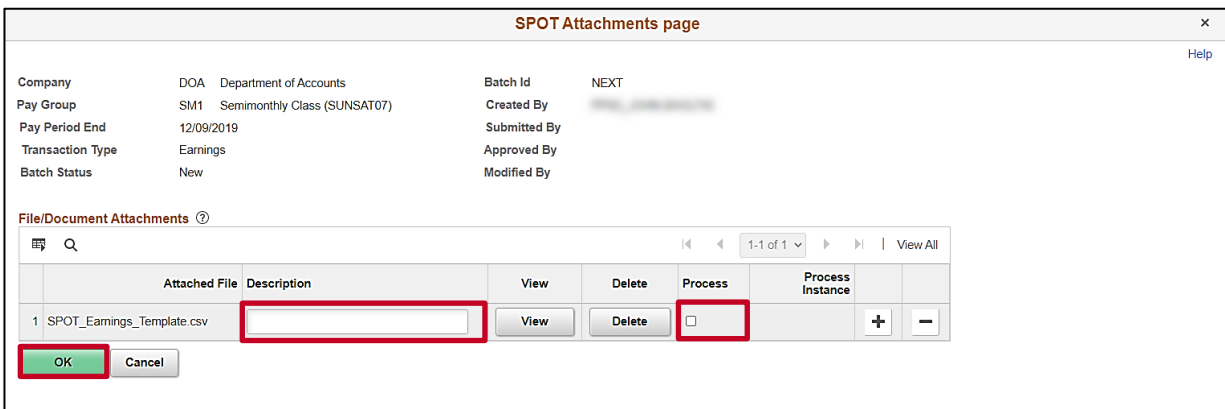
The **File Attachment** page returns.



The dialog box is titled "File Attachment" and has a close button (X) in the top right corner. Below the title bar, there is a "Choose File" button and a text field containing "SPOT Earnings Template.csv". Below the text field, there are two buttons: "Upload" and "Cancel". The "Upload" button is highlighted with a red rectangle.

24. Click the **Upload** button.

The **SPOT Attachments** page returns.



The "SPOT Attachments page" displays a summary of the batch and a table of attachments. The summary includes:

- Company: DOA Department of Accounts
- Pay Group: SM1 Semimonthly Class (SUNSAT07)
- Pay Period End: 12/09/2019
- Transaction Type: Earnings
- Batch Status: New
- Batch Id: NEXT
- Created By: [Redacted]
- Submitted By: [Redacted]
- Approved By: [Redacted]
- Modified By: [Redacted]

Below the summary is a section titled "File/Document Attachments" with a search icon and a "View All" link. The table below shows the attached files:

Attached File	Description	View	Delete	Process	Process Instance
1 SPOT_Earnings_Template.csv		View	Delete	<input type="checkbox"/>	+ -

At the bottom of the table, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with a red rectangle.

Note: The file is now connected to the batch, but individual transactions are not uploaded.

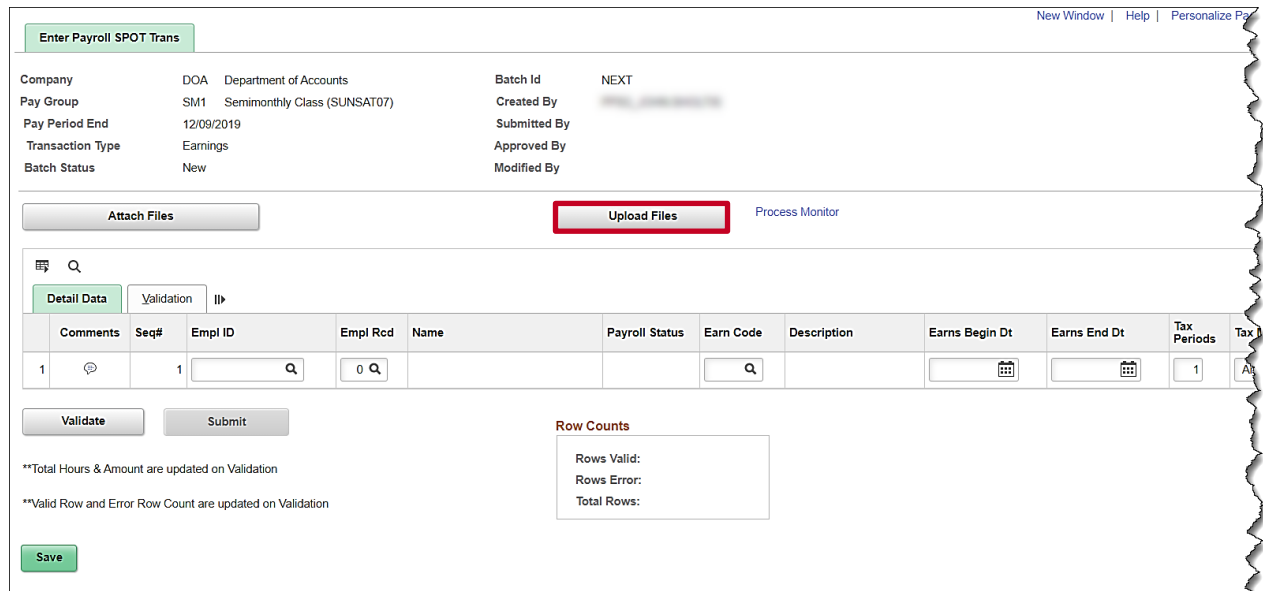
25. Enter a Description in the **Description** field if applicable.

26. Select the **Process** checkbox.

27. Click the **OK** button.

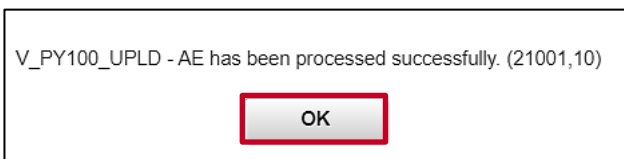
PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.



28. Click the **Upload Files** button to upload the individual transactions.

The **Successful Upload** page displays in a pop-up window.



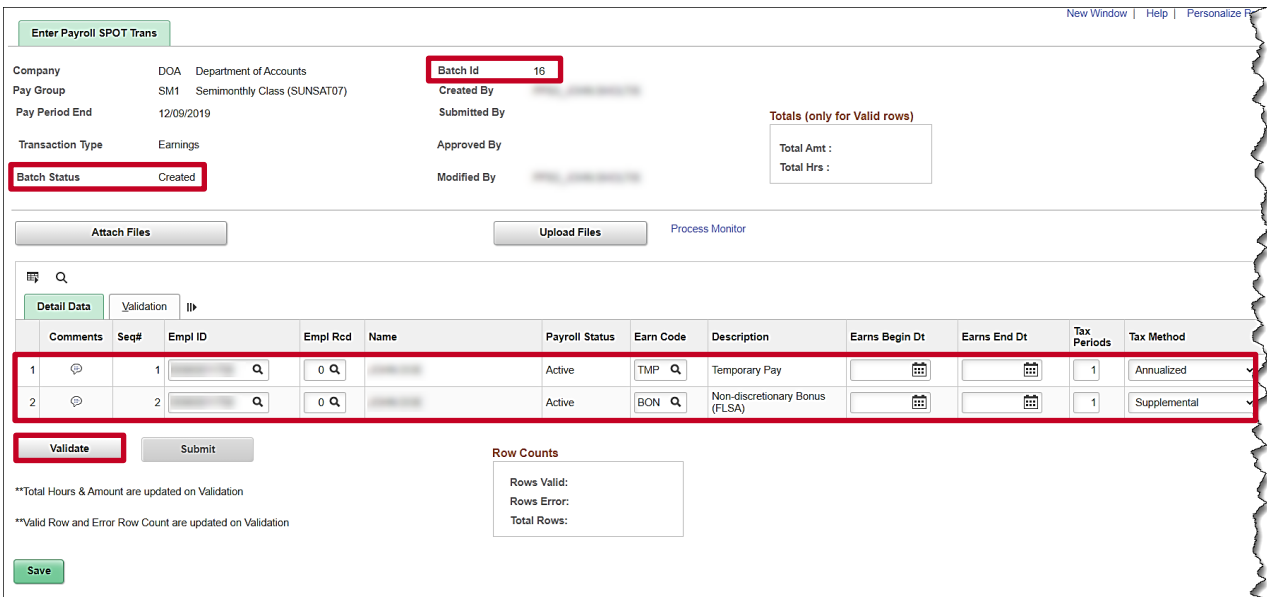
29. Click the **OK** button.

30. If the file does not successfully load, verify the following:

- All mandatory fields were properly filled out in the template
- The fields were entered using the correct format
- The file was saved in the .csv format

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter Payroll SPOT Trans** tab returns.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts
 Pay Group: SM1 Semimonthly Class (SUNSAT07)
 Pay Period End: 12/09/2019
 Transaction Type: Earnings

Batch Id: 16
 Created By: [User]
 Submitted By: [User]
 Approved By: [User]
 Modified By: [User]

Batch Status: **Created**

Totals (only for Valid rows)
 Total Amt :
 Total Hrs :

Attach Files Upload Files Process Monitor

Detail Data Validation

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1	[User]	0	[User]	Active	TMP	Temporary Pay			1	Annualized
2	2	[User]	0	[User]	Active	BON	Non-discretionary Bonus (FLSA)			1	Supplemental

Validate Submit

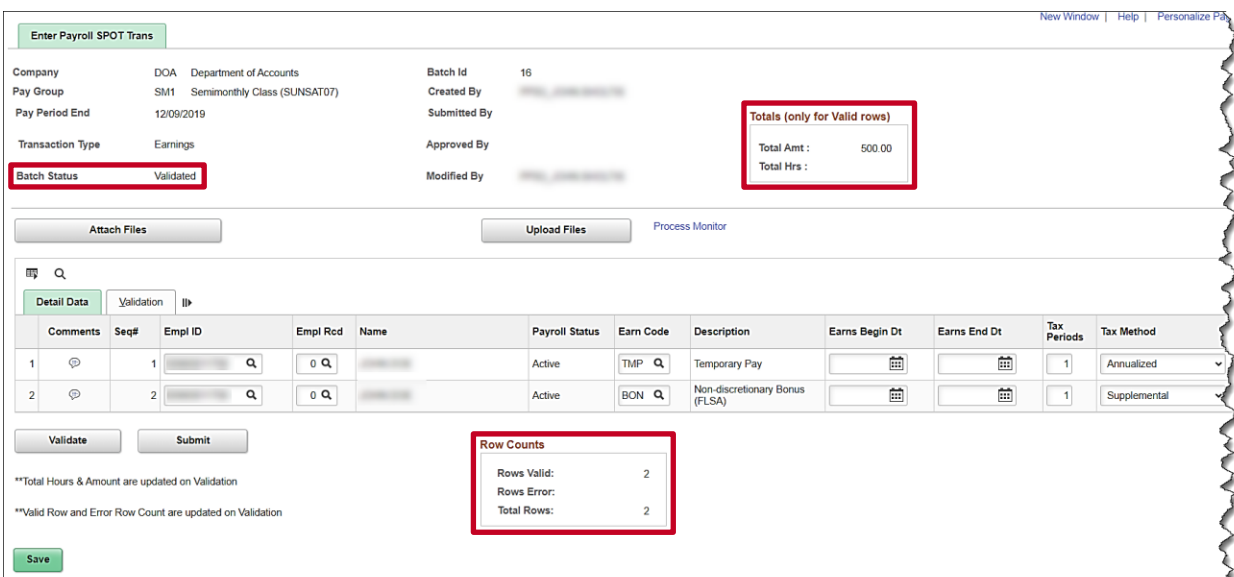
Row Counts
 Rows Valid:
 Rows Error:
 Total Rows:

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

31. Verify a **Batch ID** is assigned (“16” in this example).
32. Verify the **Batch Status** field updates to “**Created**”.
33. Verify the fields within the **Detail Data** tab were correctly input; update as required.
34. Click the **Validate** button.

The **Enter Payroll SPOT Trans** tab refreshes.



Enter Payroll SPOT Trans

Company: DOA Department of Accounts
 Pay Group: SM1 Semimonthly Class (SUNSAT07)
 Pay Period End: 12/09/2019
 Transaction Type: Earnings

Batch Id: 16
 Created By: [User]
 Submitted By: [User]
 Approved By: [User]
 Modified By: [User]

Batch Status: **Validated**

Totals (only for Valid rows)
 Total Amt : 500.00
 Total Hrs : 2

Attach Files Upload Files Process Monitor

Detail Data Validation

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax Method
1	1	[User]	0	[User]	Active	TMP	Temporary Pay			1	Annualized
2	2	[User]	0	[User]	Active	BON	Non-discretionary Bonus (FLSA)			1	Supplemental

Validate Submit

Row Counts
 Rows Valid: 2
 Rows Error: 0
 Total Rows: 2

**Total Hours & Amount are updated on Validation
 **Valid Row and Error Row Count are updated on Validation

Save

35. The **Batch Status** updates to **Validated**.
36. The **Totals (only for Valid rows)** section provides a summary of:

PY381 Using the Single-Use Payroll Online Tool (SPOT)

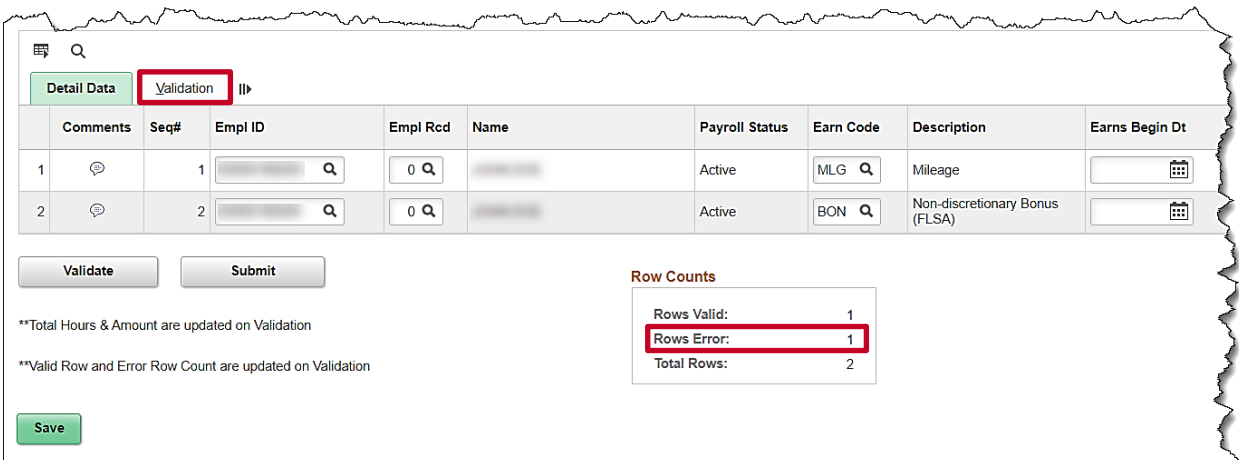
- a. **Total Amt** – sum of the values entered in the **Amount** field for the batch
- b. **Total Hrs** – sum of the values entered in the **Oth Hrs** field for the batch

37. The **Row Counts** section provides a summary of:

- a. **Rows Valid** – the number of valid rows in the batch
- b. **Rows Error** – the number of rows in the batch containing errors
- c. **Total Rows** – total number of rows in the batch (sum of **Rows Valid** and **Rows Error** fields)

38. If the **Rows Error** field is blank, indicating all rows are valid, skip to Step 49.

The screenshot below provides an example of a batch that contains an error.



The screenshot shows the SPOT interface with the 'Validation' tab selected. The table below lists two rows of data. The 'Row Counts' section on the right indicates 1 Rows Error, which is highlighted with a red box.

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1	1		0		Active	MLG	Mileage	
2	2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

Buttons: Validate, Submit, Save

Notes:

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

39. If the **Rows Error** field populates with a number, indicating at least one row is not valid, click the **Validation** tab.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Validation** tab displays.

[New Window](#) | [Help](#) | [Personalize Page](#)

Enter Payroll SPOT Trans

Company DOA Department of Accounts

Pay Group SM1 Semimonthly Class (SUNSAT07)

Pay Period End 12/09/2019

Transaction Type Earnings

Batch Status Validated

Batch Id 11

Created By [Redacted]

Submitted By [Redacted]

Approved By [Redacted]

Modified By [Redacted]

Totals (only for Valid rows)
 Total Amt : 200.00
 Total Hrs :

Attach Files

Upload Files

[Process Monitor](#)

Detail Data

Validation

II>

1-2 of 2

View All

	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1		1	[Redacted]	0	[Redacted]	OK			+	-
2		2	[Redacted]	0	[Redacted]	Error			+	-

Validate

Submit

Row Counts
 Rows Valid: 1

Rows Error: 1

 Total Rows: 2

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Add

Update/Display

- The **Validation** tab displays the status of every line within a batch and an error message for lines that are not valid.
 - The **Status** field displays one of two statuses:
 - **OK** – no errors
 - **Error** – issue with line
 - If there is an error during validation, the **Row Counts** section displays the number of lines with an error in the **Rows Error** field, the **Status** field populates with “**Error**” for all lines containing an error, and a bubble populates in the **Error Msg** field for all lines containing an error
40. Click the **Bubble** icon in the **Error Msg** field to view the error message.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Review Notes Page** pop-up window displays.

SPOT Review Notes page ×

[Help](#)

Empl ID

Empl Record 0

Seq# 2

Notes

If the benefit deduction taken is S(subset), the subset is required ;If the General Benefit deduction taken is S(subset), the General Benefit subset is required ;

OK
Cancel

41. Read through the **Notes** field and click the **OK** button.

The **Validation** tab returns.

Enter Payroll SPOT Trans
New Window | Help | Personalize Page

Company	DOA Department of Accounts	Batch Id	11
Pay Group	SM1 Semimonthly Class (SUNSAT07)	Created By	
Pay Period End	12/09/2019	Submitted By	
Transaction Type	Earnings	Approved By	
Batch Status	Validated	Modified By	

Totals (only for Valid rows)
 Total Amt : 200.00
 Total Hrs :

Attach Files
Upload Files
Process Monitor

Detail Data
Validation

1-2 of 2
View All

Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status	Error Msg		
1			0		OK			+	-
2			0		Error		!	+	-

Validate
Submit

Row Counts
 Rows Valid: 1
 Rows Error: 1
 Total Rows: 2

Save
Add
Update/Display

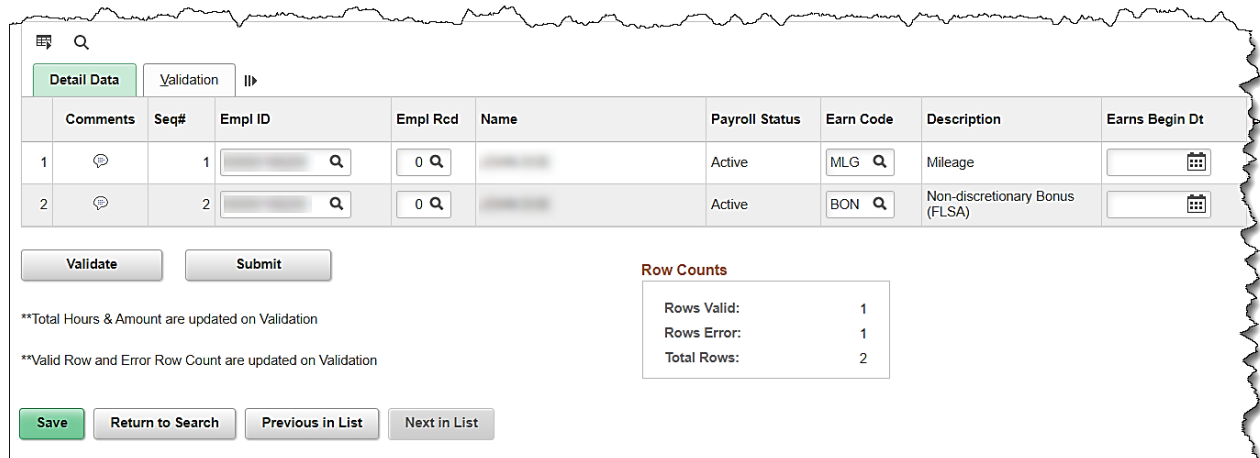
**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

42. Click the **Detail Data** tab.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Detail Data** tab returns.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
	1	[redacted]	0	[redacted]	Active	MLG	Mileage	[redacted]
	2	[redacted]	0	[redacted]	Active	BON	Non-discretionary Bonus (FLSA)	[redacted]

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

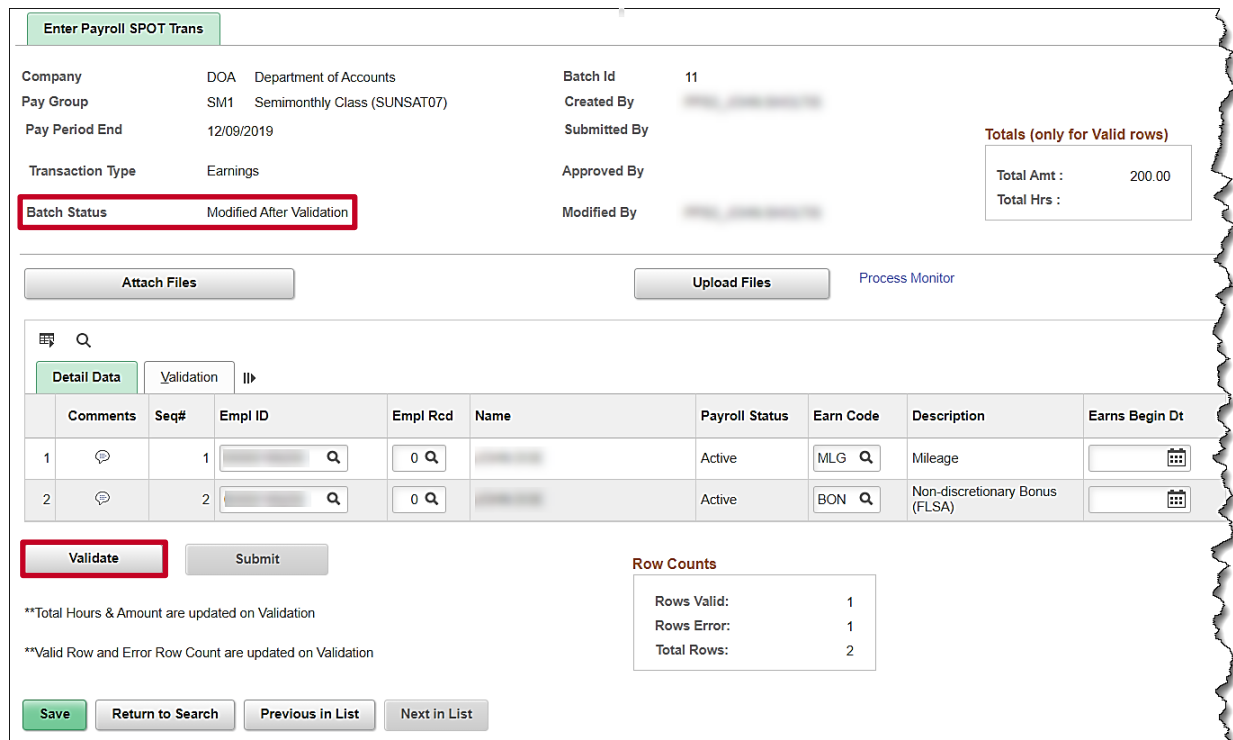
**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

43. Update the applicable fields to correct the identified errors.

44. Click the **Save** button.

The **Enter SPOT Transactions** page refreshes.



Enter Payroll SPOT Trans

Company DOA Department of Accounts Batch Id 11

Pay Group SM1 Semimonthly Class (SUNSAT07) Created By [redacted]

Pay Period End 12/09/2019 Submitted By [redacted]

Transaction Type Earnings Approved By [redacted]

Batch Status Modified After Validation Modified By [redacted]

Totals (only for Valid rows)

Total Amt :	200.00
Total Hrs :	[redacted]

Detail Data

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
	1	[redacted]	0	[redacted]	Active	MLG	Mileage	[redacted]
	2	[redacted]	0	[redacted]	Active	BON	Non-discretionary Bonus (FLSA)	[redacted]

Row Counts

Rows Valid:	1
Rows Error:	1
Total Rows:	2

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Note: All line items in a batch must pass validation before the batch can be submitted for approval. The **Submit** button is not enabled until all lines are validated.

45. Verify the **Batch Status** field updates to “**Modified After Validation**”.

46. Click the **Validate** button.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Enter SPOT Transactions** page refreshes.

Enter Payroll SPOT Trans

Company

DOA Department of Accounts

Batch Id

11

Pay Group

SM1 Semimonthly Class (SUNSAT07)

Created By

Pay Period End

12/09/2019

Submitted By

Transaction Type

Earnings

Approved By

Batch Status

Validated

Modified By

Totals (only for Valid rows)

Total Amt :

1200.00

Total Hrs :

Attach Files

Upload Files

Process Monitor

Detail Data

Validation

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt
1		1		0		Active	MLG	Mileage	
2		2		0		Active	BON	Non-discretionary Bonus (FLSA)	

Validate

Submit

Row Counts

Rows Valid:

2

Rows Error:

Total Rows:

2

**Total Hours & Amount are updated on Validation

**Valid Row and Error Row Count are updated on Validation

Save

Return to Search

Previous in List

Next in List

47. Verify the **Batch Status** field updates to “**Validated**”.

48. Verify the **Rows Error** field is blank, indicating all errors have been fixed.

49. Click the **Submit** button to submit the batch for review.

A **Confirmation Message** displays in a pop-up window.

Are you sure you want to submit the Batch? (25200,36)

Once Batch is submitted, it can not be edited. Are you sure you want to submit the batch?

OK

Cancel

50. Click the **OK** button to submit the batch for review.

Note: A batch cannot be edited after it is submitted.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

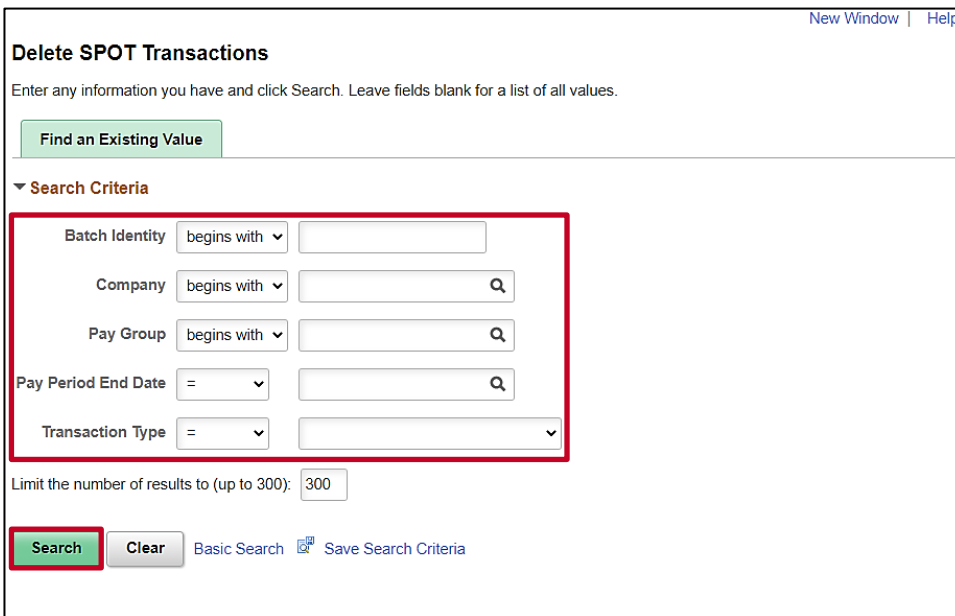
Delete SPOT Batches

Payroll Administrators can delete batches if the batch has not been closed. All transactions within a batch are deleted and will not process when a batch is deleted. This process cannot be undone, so use only as appropriate.

Utilize the **Delete a Row** button (-) to only delete specific transactions within a batch.

1. Navigate to the **Delete SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Delete Spot Transactions



Delete SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Batch Identity: begins with []

Company: begins with [] [Q](#)

Pay Group: begins with [] [Q](#)

Pay Period End Date: = [] [Q](#)

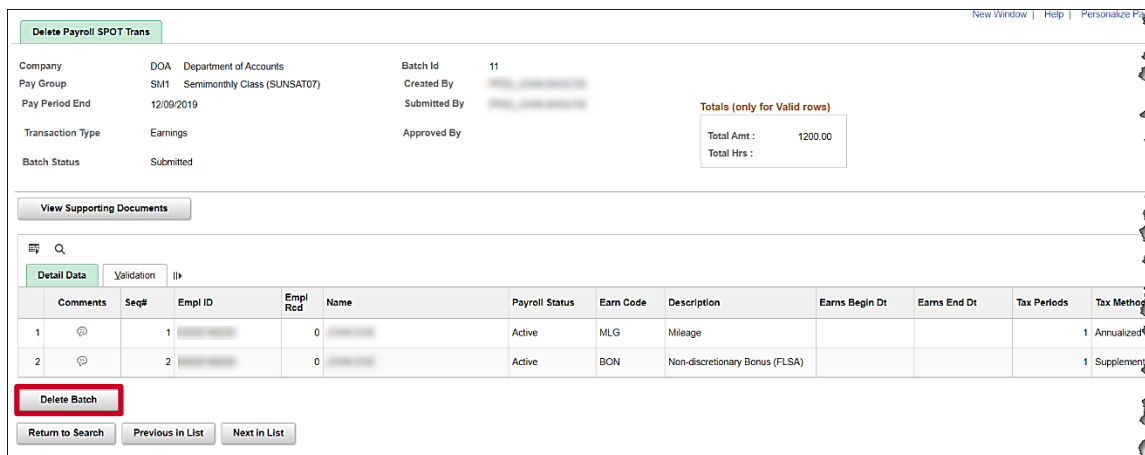
Transaction Type: = []

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Enter the search criteria in the corresponding fields for the applicable batch.
3. Click the **Search** button.

The **Delete SPOT Transactions** page refreshes with the applicable batch displayed.



Delete Payroll SPOT Trans

Company: DOA Department of Accounts Batch Id: 11

Pay Group: SM1 Semimonthly Class (SUNSAT07) Created By: []

Pay Period End: 12/09/2019 Submitted By: []

Transaction Type: Earnings Approved By: []

Batch Status: Submitted

Totals (only for Valid rows)

Total Amt: 1200.00

Total Hrs: []

[View Supporting Documents](#)

[Detail Data](#) [Validation](#) [II>](#)

Comments	Seq#	Empl ID	Empl Rod	Name	Payroll Status	Earn Code	Description	Earnings Begin Dt	Earnings End Dt	Tax Periods	Tax Method
1	1	[]	0	[]	Active	MLG	Mileage			1	Annualized
2	2	[]	0	[]	Active	BCN	Non-discretionary Bonus (FLSA)			1	Supplemental

[Delete Batch](#)

[Return to Search](#) [Previous in List](#) [Next in List](#)

PY381 Using the Single-Use Payroll Online Tool (SPOT)

4. Click the **Delete Batch** button to delete the batch.

A **Confirmation Message** displays.

Are you sure you want to delete the Batch? (25200,38)

Once Batch is deleted it can not be opened or edited again. Are you sure you want to Delete the batch?

5. Click the **OK** button to delete the batch. Once a batch is deleted, it cannot be opened or edited.

The **Delete SPOT Transactions** search page returns.

Delete SPOT Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Batch Identity

begins with ▼

1

Company

begins with ▼

DOA

Pay Group

begins with ▼


Pay Period End Date

= ▼

Transaction Type

= ▼

Limit the number of results to (up to 300):

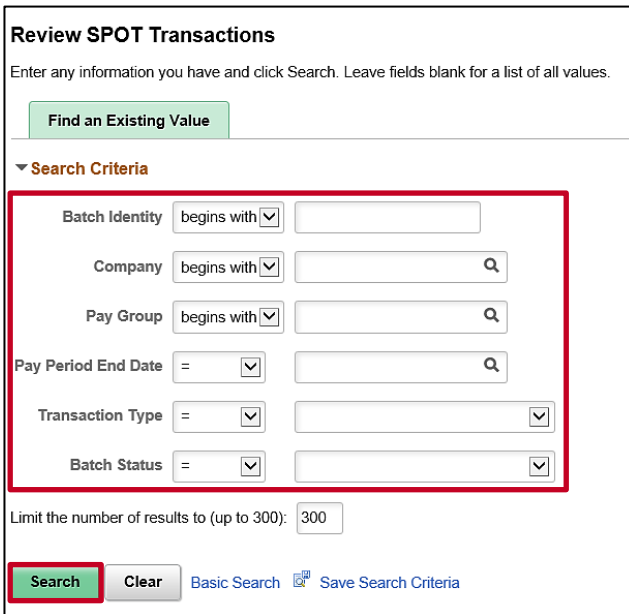
[Basic Search](#)  [Save Search Criteria](#)

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Approve SPOT Transactions

Each Agency designates at least one person as the SPOT Approver to review and approve SPOT Transactions. SPOT Approvers cannot approve a batch they personally entered. SPOT Approvers should work closely with the Payroll Administrators. A SPOT Transaction must be reentered if it is denied.

1. Navigate to the **Review SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Review SPOT Transactions



2. Enter the applicable/known search criteria to find the appropriate batch. Search options include the following:

Fields	Descriptions
Batch Identity	Number assigned to the Batch.
Company	The three character company code.
Pay Group	Pay group options for the Company
Pay Period End Date	Select the Pay Period end date for the batch you want to approve.
Transaction Types	Select the appropriate option: <ul style="list-style-type: none"> • Earnings • Deductions
Batch Status	Options include: <ul style="list-style-type: none"> • Closed • Created • Deleted • In Review

PY381 Using the Single-Use Payroll Online Tool (SPOT)

	<ul style="list-style-type: none"> • Modified After Validation • New • Submitted • Validated
--	--

3. Click the **Search** button.

The **Review SPOT Transactions** page refreshes and displays matching the Search Results.

Review SPOT Transactions
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Batch Identity begins with
Company begins with DOA
Pay Group begins with SM1
Pay Period End Date = 12/09/2019
Transaction Type =
Batch Status = Submitted
Limit the number of results to (up to 300): 300

[Basic Search](#)

Search Results

View All 1-2 of 2

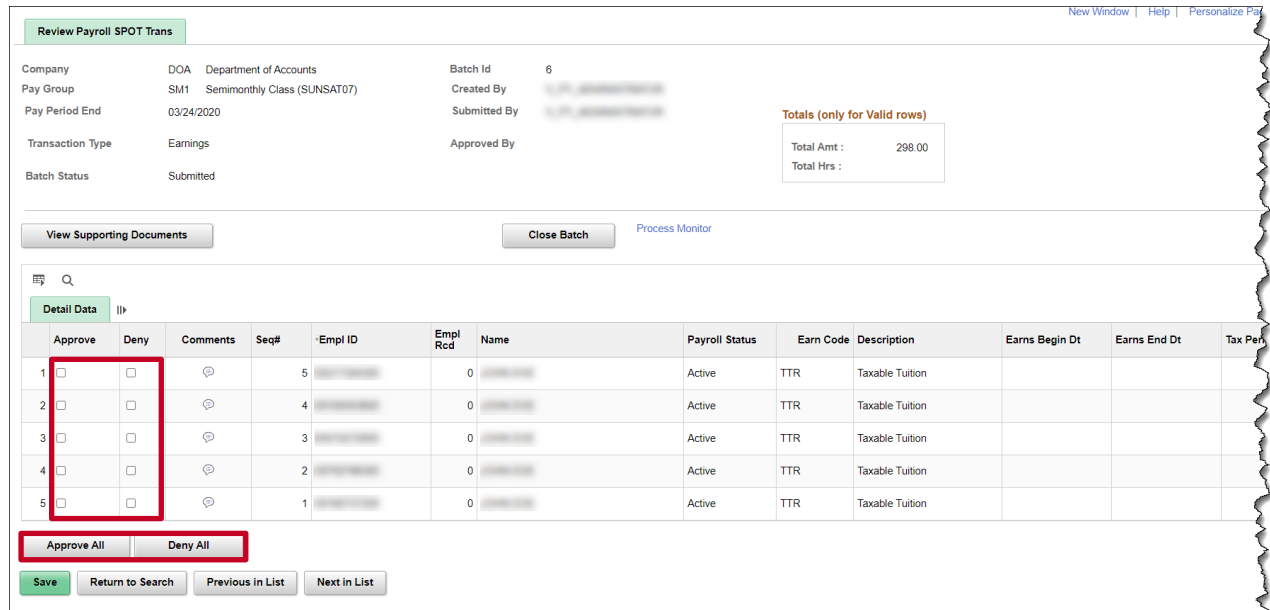
Batch Identity	Company	Pay Group	Pay Period End Date	Transaction Type	Batch Status
4	DOA	SM1	12/09/2019	Earnings	Submitted
5	DOA	SM1	12/09/2019	Deduction	Submitted

4. Click anywhere on the appropriate batch's line to navigate to the corresponding batch's **Review Payroll SPOT Trans** tab.

Note: This step is automatically skipped if only one batch matches the Search Criteria entered.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

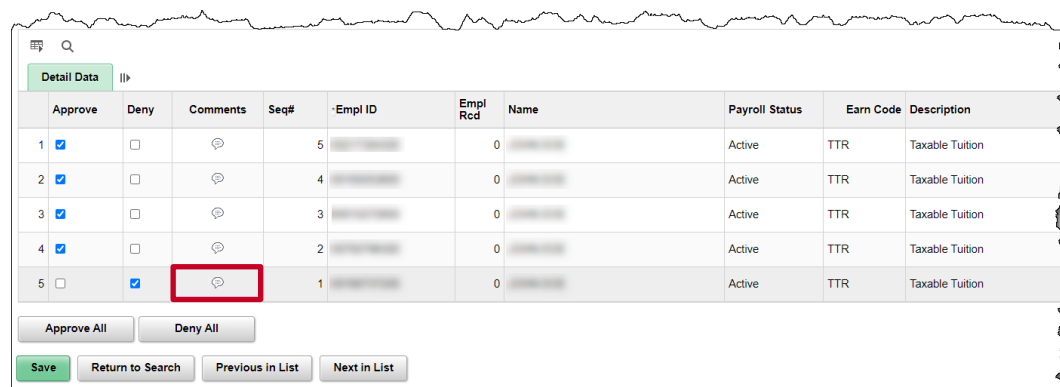
The **Review Payroll SPOT Trans** tab displays.



5. Review the entries on the batch.
6. Approve or deny the batch using one of the following options:
 - a. To approve or deny individual transactions, select the appropriate **Approve** or **Deny** checkbox option for each individual transaction.
 - b. To approve or deny the entire batch, select the appropriate **Approve All** or **Deny All** button.

Note: SPOT Approvers cannot edit SPOT transactions.

The **Detail Data** tab updates.

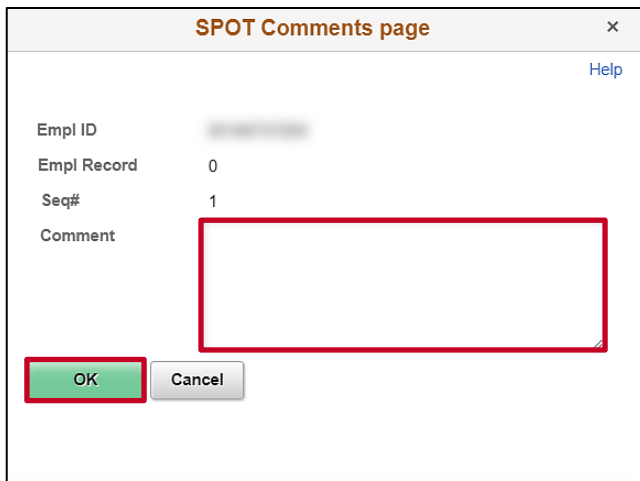


Note: In this example, four transactions were approved and one transaction was denied.

7. Click the corresponding **Comments** icon for any denied transactions.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Comments** page pop-up window displays.



The screenshot shows a pop-up window titled "SPOT Comments page" with a close button (X) in the top right corner. Inside the window, there is a "Help" link in the top right. The form contains the following fields:

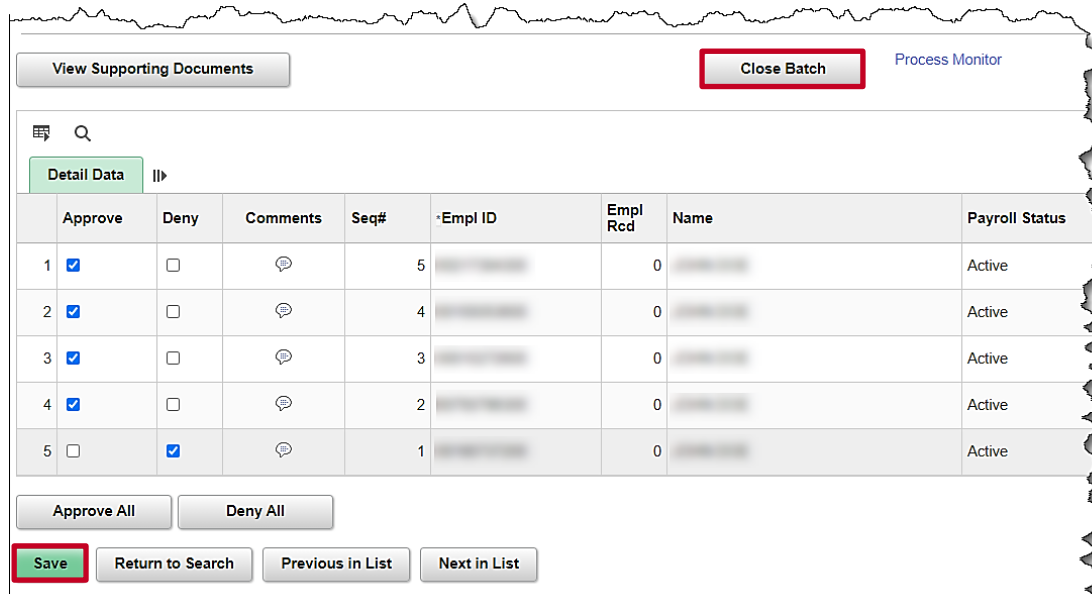
- Empl ID: [Redacted]
- Empl Record: 0
- Seq#: 1
- Comment: [Large empty text box with a red border]

At the bottom left, there are two buttons: "OK" (highlighted with a red border) and "Cancel".

Note: Cardinal does not require a comment, but comments are strongly recommended for audit purposes.

8. Enter a comment explaining why the transaction was denied in the **Comment** field.
9. Click the **OK** button.

The **Review Payroll SPOT Trans** tab returns.



The screenshot shows the "Review Payroll SPOT Trans" tab. At the top, there are buttons for "View Supporting Documents", "Close Batch" (highlighted with a red border), and a "Process Monitor" link. Below these is a search bar and a "Detail Data" tab. The main area contains a table with the following columns: Approve, Deny, Comments, Seq#, Empl ID, Empl Rcd, Name, and Payroll Status. The table has 5 rows of data. At the bottom, there are buttons for "Approve All", "Deny All", "Save" (highlighted with a red border), "Return to Search", "Previous in List", and "Next in List".

	Approve	Deny	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		5	[Redacted]	0	[Redacted]	Active
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		4	[Redacted]	0	[Redacted]	Active
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		3	[Redacted]	0	[Redacted]	Active
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		2	[Redacted]	0	[Redacted]	Active
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1	[Redacted]	0	[Redacted]	Active

10. Click the **Save** button.
11. Click the **Close Batch** button to submit the batch for processing.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **Confirmation Message** displays in a pop-up window.

Are you sure you want to close the Batch? (25200,37)

Once Batch is closed it can not be reviewed or edited again. All Approved transactions will be posted to NA Payroll. Are you sure you want to Close the batch?

OK
Cancel

12. Click the **OK** button.

The **Review Payroll SPOT Trans** tab refreshes.

[New Window](#) | [Help](#) | [Personalize Page](#)

Review Payroll SPOT Trans

Company	DOA Department of Accounts	Batch Id	6	
Pay Group	SM1 Semimonthly Class (SUNSAT07)	Created By		
Pay Period End	03/24/2020	Submitted By		
Transaction Type	Earnings	Approved By		
Batch Status	Closed			

Totals (only for Valid rows)
 Total Amt : 298.00
 Total Hrs :

View Supporting Documents
Close Batch
Process Monitor
Instance 1321115

13. Verify the **Batch Status** field updates to “**Closed**”.

14. Verify the **Approved By** field populates with your Cardinal ID.

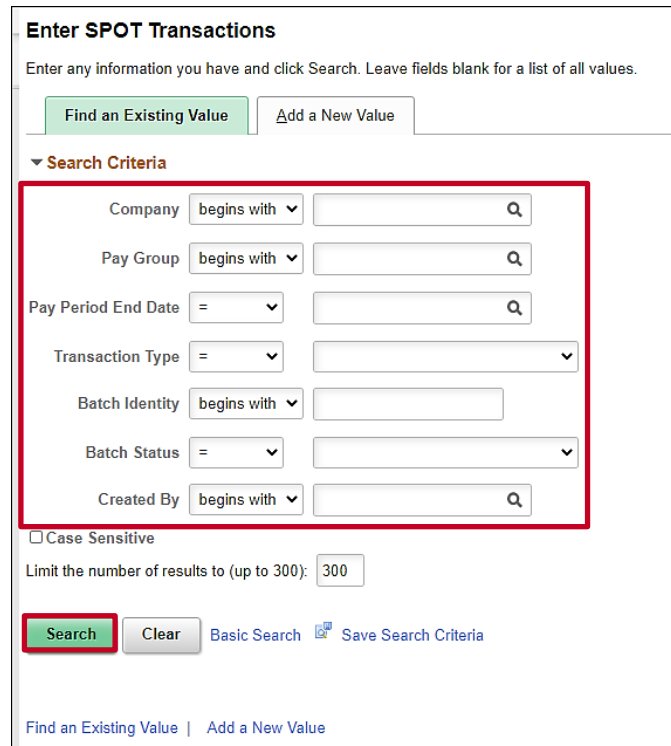
Note: The transactions will be loaded to payroll during the next SPOT Load to Payroll process.

PY381 Using the Single-Use Payroll Online Tool (SPOT)**Review Batches after Approval**

After a SPOT Approver has reviewed and approved or denied a batch, the Payroll Administrator can review the status. If a SPOT transaction is denied, it must be re-entered into a new batch for processing.

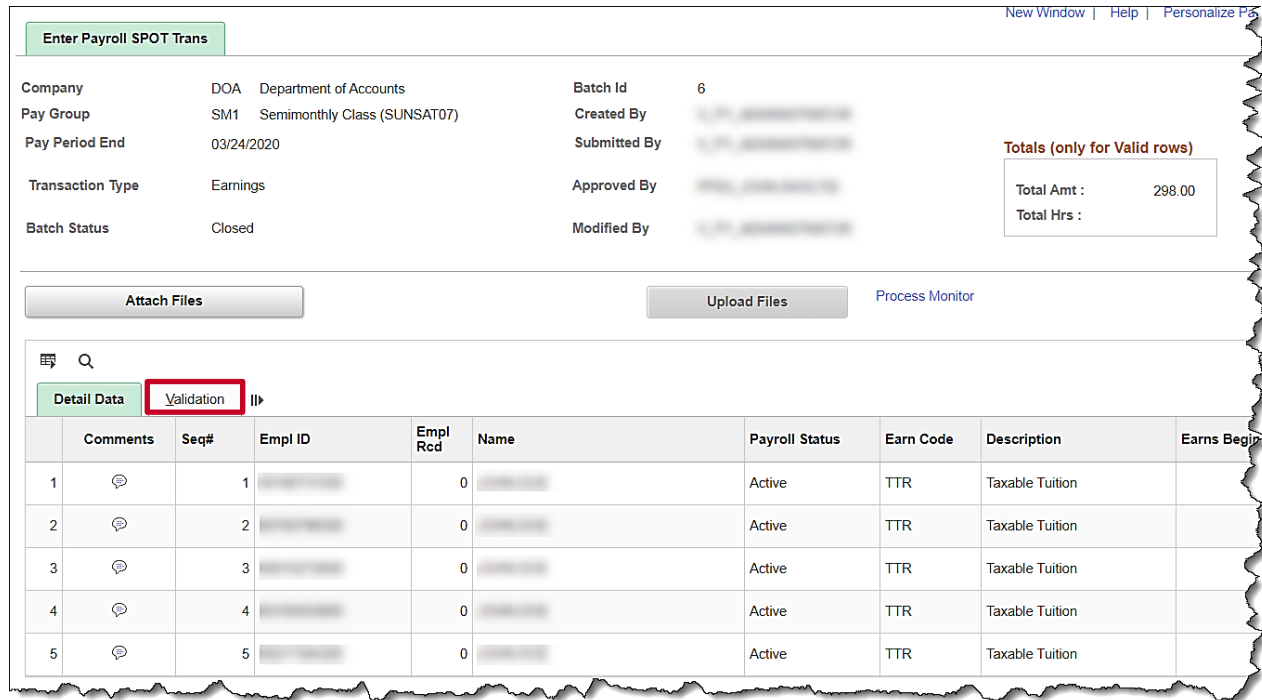
1. To review a batch for approval, navigate to the **Enter SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions



2. Enter the appropriate data in the corresponding **Search Criteria** fields.
3. Click the **Search** button.

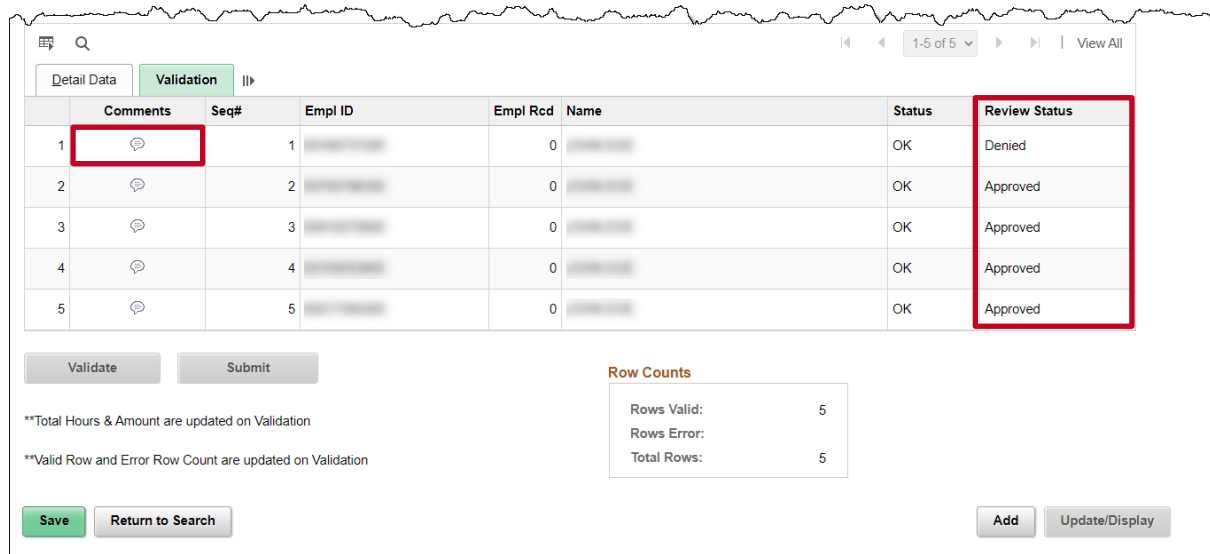
The **Enter Payroll SPOT Trans** tab displays for the applicable batch.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin
	1		0		Active	TTR	Taxable Tuition	
	2		0		Active	TTR	Taxable Tuition	
	3		0		Active	TTR	Taxable Tuition	
	4		0		Active	TTR	Taxable Tuition	
	5		0		Active	TTR	Taxable Tuition	

4. Click the **Validation** tab to review the approval status of the transactions on the batch.

The **Validation** tab displays.



Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status
	1		0		OK	Denied
	2		0		OK	Approved
	3		0		OK	Approved
	4		0		OK	Approved
	5		0		OK	Approved

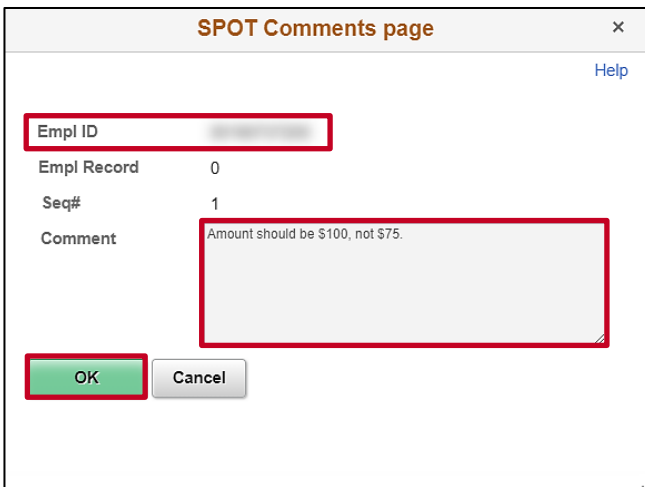
Row Counts
 Rows Valid: 5
 Rows Error: 0
 Total Rows: 5

5. Review the **Review Status** field, which indicates whether each transaction was approved or denied.

6. Click the **Comments** icon for any transaction(s) that were denied.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Comments** page displays in a pop-up window.

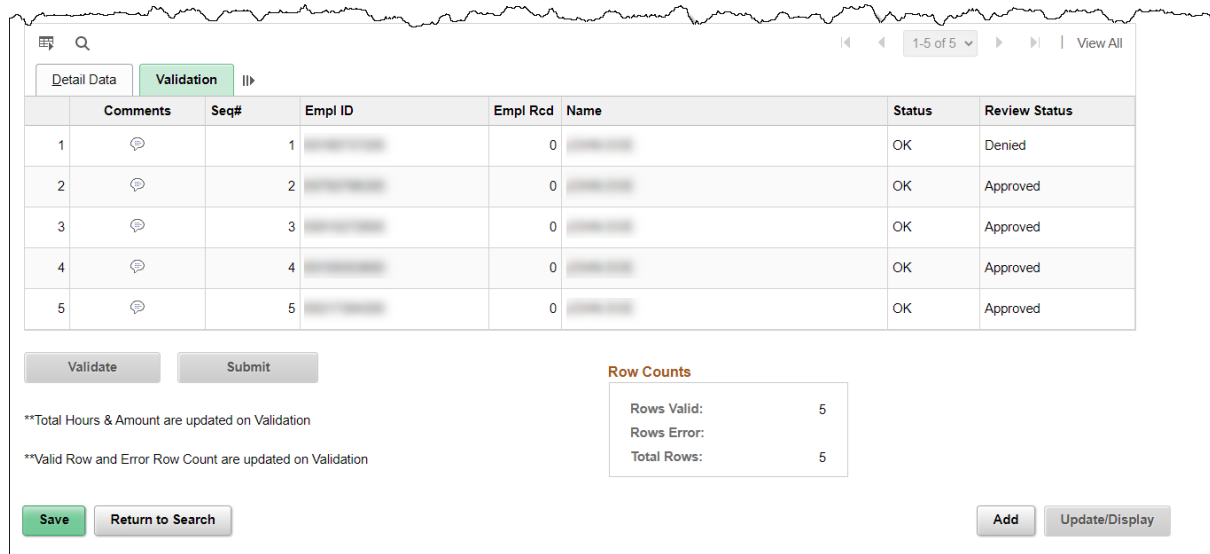


7. Make note of the Employee ID and any comments provided.

Note: If there is no comment recorded, contact the SPOT Approver to discuss the reason the transaction was denied.

8. Click the **OK** button.

The **Validation** tab returns.



	Comments	Seq#	Empl ID	Empl Rcd	Name	Status	Review Status
1				0		OK	Denied
2				0		OK	Approved
3				0		OK	Approved
4				0		OK	Approved
5				0		OK	Approved

Row Counts
 Rows Valid: 5
 Rows Error: 0
 Total Rows: 5

Note: For additional information on entering SPOT transactions, refer to the **Enter an Earnings Transaction in SPOT** or **Enter a Deduction Transaction in SPOT** sections of this Job Aid.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

Monitor SPOT Transactions

There are two key SPOT tools to help monitor transactions:

- Single-Use Payroll Online Transaction (SPOT) Online query
- SPOT Transactions Not Loaded to Paylines

SPOT Online Query

This query displays all SPOT Transactions for a specific pay period. Navigate to the SPOT Online Transaction Query using the following path:

Navigator > Reporting Tools > Query > Query Viewer

The **Query Viewer** page displays.



Query Viewer

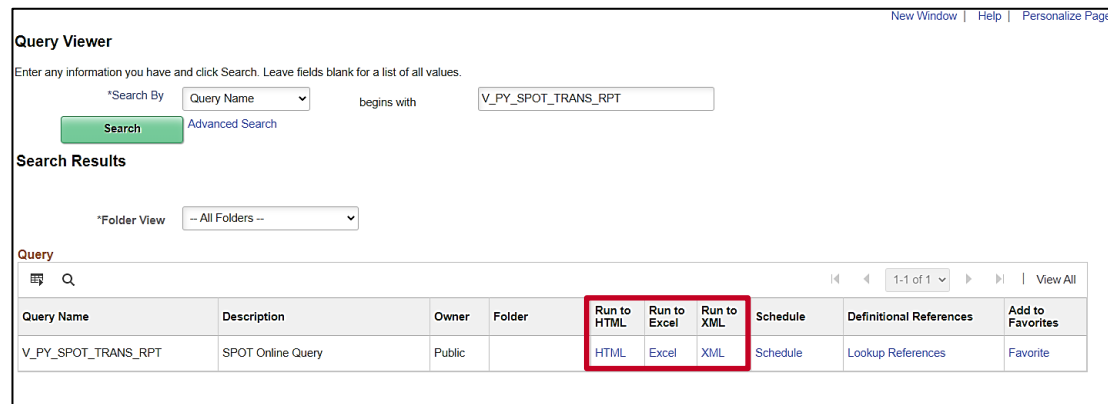
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Query Name begins with

Search [Advanced Search](#)

1. Enter **V_PY_SPOT_TRANS_RPT** in the **begins with** field.
2. Click the **Search** button.

The **Query Viewer** page refreshes.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Query Name begins with

Search [Advanced Search](#)

*Folder View -- All Folders --

Search Results

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_PY_SPOT_TRANS_RPT	SPOT Online Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite




3. Select the applicable **Run to** link (e.g., HTML, Excel, XML).

Note: The **Run to HTML** link was selected in the example below.

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Online Query** opens in a new Internet Browser window.




V_PY_SPOT_TRANS_RPT - SPOT Online Query

Company 
 Paygroup 
 Pay Run ID 
 View Results

Row	Agency (Company)	Paygroup	Business Unit	Agency Description	Pay Period End Date	Batch ID	Batch Status	Transaction Type	Valid Status	Review Status	Employee ID	Empl Record	Employee Name	Employee Status	Deduction or Earnings Code	Deduction or Earnings Amount	Other Hours
-----	------------------	----------	---------------	--------------------	---------------------	----------	--------------	------------------	--------------	---------------	-------------	-------------	---------------	-----------------	----------------------------	------------------------------	-------------

4. Enter/select the applicable Company, Paygroup, and Pay Run ID using the corresponding look-up icons.
5. Click the **View Results** button.

V_PY_SPOT_TRANS_RPT - SPOT Online Query

Company 
 Paygroup 
 Pay Run ID 
 View Results

Download results in : Excel Spreadsheet CSV Text File XML File (5 kb)

View All

Agency (Company)	Paygroup	Business Unit	Agency Description	Pay Period End Date	Batch ID	Batch Status	Transaction Type	Valid Status	Review Status	Employee ID	Empl Record	Employee Name	Employee Status	Deduction or Earnings Code	Deduction or Earnings Amount	Other Hours
1 MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	2	Closed	Earnings	OK	Approved	T655514	0		Active	BON	200.00	0.00
2 MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	1	Closed	Earnings	OK	Approved	T655514	0		Active	BON	200.00	0.00
3 MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	2	Closed	Earnings	OK	Approved	T655515	0		Active	DBN	150.00	0.00
4 MFA	SM1	23800	VA Museum of Fine Arts	10/24/2017	1	Closed	Earnings	OK	Approved	T655515	0		Active	DBN	150.00	0.00

First 1-4 of 4 Last

Note: The results can be downloaded to Excel, CSV or XML for review.

SPOT Transactions Not Loaded to Paylines Report

Batches are loaded to the Paysheet Transaction Table after they are closed. The Delivered Paysheet Transaction Process runs according to operation calendars.

The **SPOT Transactions Not Loaded to Paylines** report reflects transactions that are both Accepted and Closed but do not appear in the employee's paycheck.

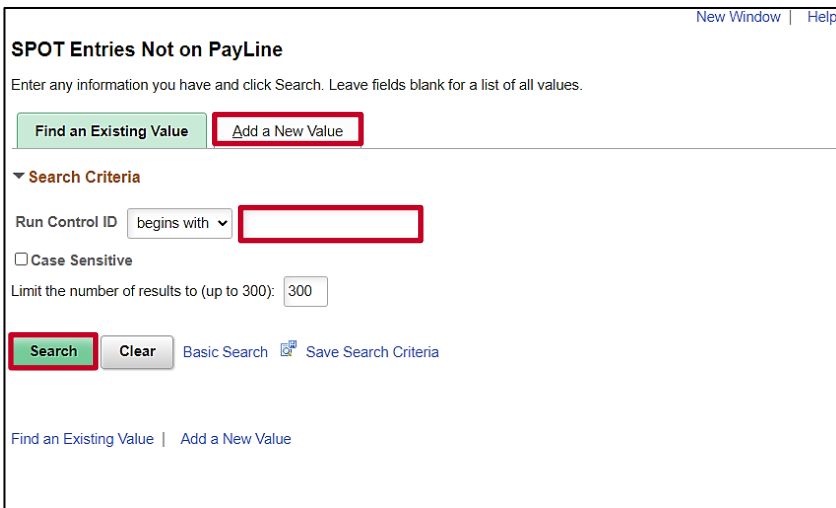
Note: For further information about Reviewing Employee Paychecks, refer to the Job Aid titled **PY381 Review the View Paycheck Page**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. Navigate to the **SPOT Transactions Not Loaded to Paylines** report using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > SPOT Entries Not on PayLine

PY381 Using the Single-Use Payroll Online Tool (SPOT)

The **SPOT Entries Not on PayLine** page displays.



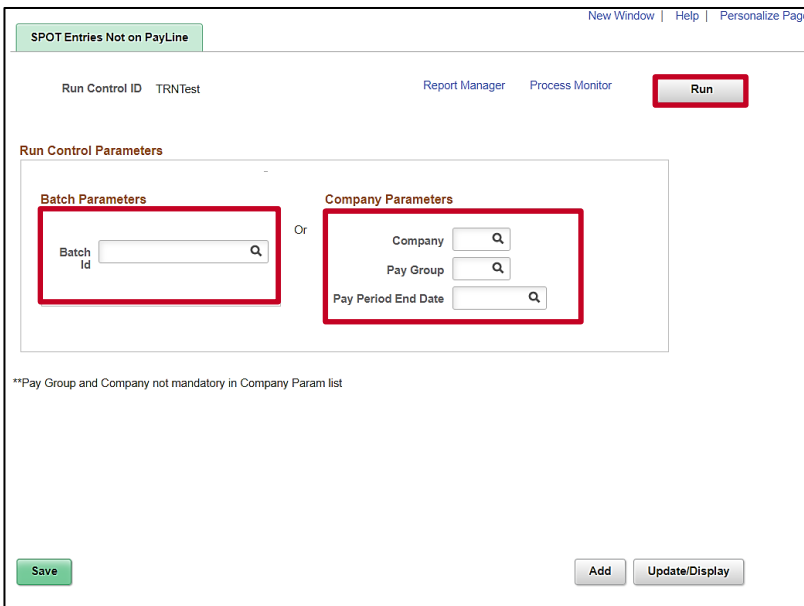
7. To search for an existing Run Control ID, enter the Run Control ID name in the **Run Control ID** field.
8. Click the **Search** button, then skip to Step 7.
9. To create a new Run Control ID, click the **Add a New Value** tab.

The **Add a New Value** tab displays.



10. Enter the desired name in the **Run Control ID** field.
11. Click the **Add** button.

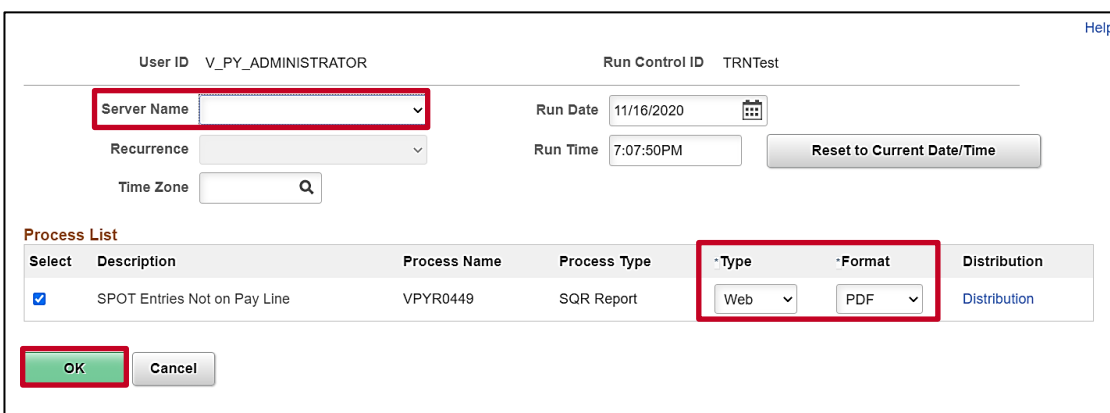
The **SPOT Entries Not on PayLine** page refreshes.



12. Enter/select the appropriate Run Control Parameters using either the **Batch Parameters** section or **Company Parameters** section.
 - a. To use Batch Parameters, enter/select the appropriate Batch ID using the **Batch ID** field look-up icon.
 - b. To use Company Parameters, enter/select the appropriate Company, Pay Group, and Pay Period End Date using the corresponding field look-up icons.

Note: The **Pay Group** and **Company** fields are not mandatory.

13. Click the **Run** button.



Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	SPOT Entries Not on Pay Line	VPYR0449	SQR Report	Web	PDF	Distribution

14. Select the appropriate Server Name using the **Server Name** drop-down menu.
15. Confirm the **Type** and **Format** are correct.
16. Click the **Ok** button.

The **SPOT Entries Not on PayLine** page refreshes.

SPOT Entries Not on PayLine

Run Control ID

TRNTest

Report Manager

Process Monitor

Run

Run Control Parameters

Batch Parameters

Batch Id

Or

Company Parameters

Company

Pay Group

Pay Period End Date

**Pay Group and Company not mandatory in Company Param list

17. Click the **Report Manager** link.

The **Report Manager** page displays.

List Explorer Administration Archives

View Reports For

Folder

Instance to

Refresh

Name

Created On

Last

1 Days

Reports

1-2 of 2

View All

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 VPYR0449	SPOT ENTRIES NOT ON PAY LINE	General	11/16/20 7:11PM	751091	1308709
2 VPYR0449	SPOT ENTRIES NOT ON PAY LINE	General	11/16/20 7:10PM	751090	1308708

Go back to SPOT Entries Not on PayLine

Save

18. Click the **Refresh** button until the appropriate report displays.

19. Click the **Report** link to review.



PY381 Using the Single-Use Payroll Online Tool (SPOT)

The Report Information displays.

Report
Report ID 751091 Process Instance 1308709 [Message Log](#)
Name VPYR0449 Process Type SQR Report
Run Status Error

SPOT Entries Not on Pay Line

Distribution Details
Distribution Node hrpytrn Expiration Date 12/16/2020

File List


Name	File Size (bytes)	Datetime Created
SQR_VPYR0449_1308709.log	1,114	11/16/2020 7:11:35.645449PM EST

Distribute To

Distribution ID Type	Distribution ID
User	V_PY_ADMINISTRATOR

[Return](#)

20. Click the **Name** link to view the report.



Commonwealth of Virginia
SPOT TRANSACTIONS NOT LOADED TO PAYLINE
Run Date: 05/25/2018
Run Time: 12:58 00

Report ID: VPYR0449

Page No. 1 of 1

Batch Id : 103
Pay Period End : 19-AUG-2017
Business Unit : 23800 VA Museum of Fine Arts
Company : MFA Pay Group : BW1
Batch Type : D Batch_Status : Closed

Seq#	EmplID	Empl Rcd	Name	Payroll Status	Plan Type	Benefit Plan	Ded Code	Description	Ded Class	Amount	One-Time Code	Seperate Check#
1	T655362	0	T655362,Employee	A	10	CVABAS	CVACRE	CoVA Care	B	\$.00	P	0
2	T655793	0	Employee,Employee T655793	A	42	RTCRDJ	RETHCJ	Judicial Retiree Health Credit	P	\$.00	R	0

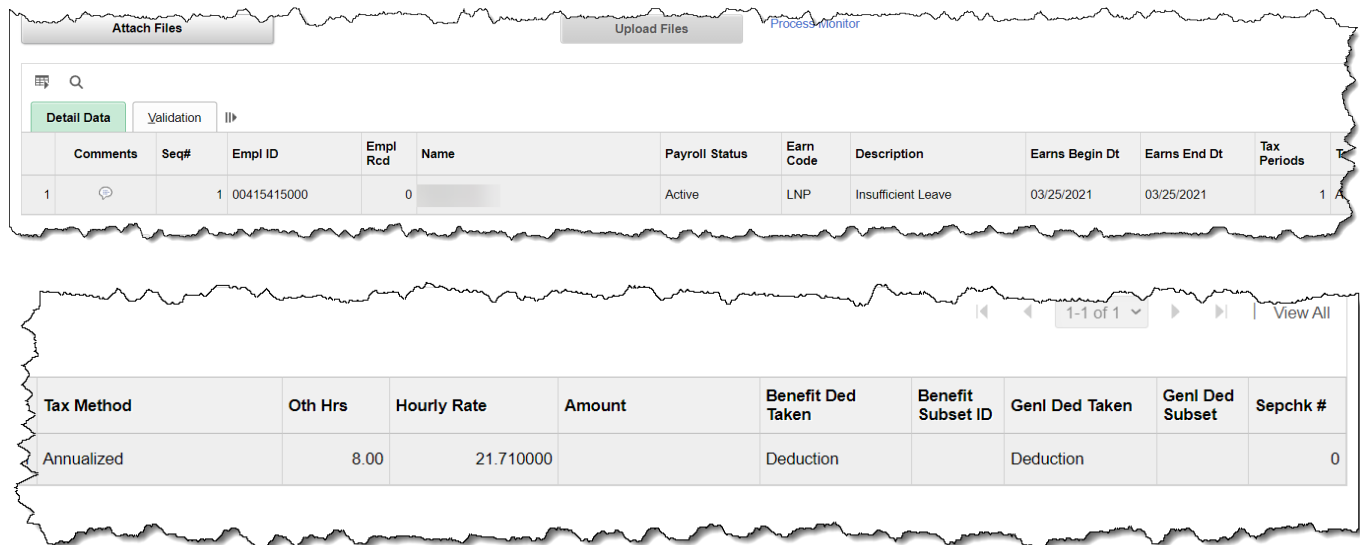
Note: For further information on the **SPOT Transactions Not Loaded to PayLine Report**, refer to the HCM Reports Catalog. This Catalog is located on the Cardinal website under **Learning**.

PY381 Using the Single-Use Payroll Online Tool (SPOT)
SPOT Scenarios

In this section, we will review various scenarios regarding how to enter specific transactions into SPOT. For each scenario, you will be able to see how to enter the transaction into SPOT and how it displays on the Review Paycheck page.

Entering Pay Docking (LNP)

In this scenario, we will enter 8 hours of pay docking for an employee in the current payroll (pay period ending 04/09/2021)



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods
	1	00415415000	0		Active	LNP	Insufficient Leave	03/25/2021	03/25/2021	1

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #
Annualized	8.00	21.710000		Deduction		Deduction		0

1. Enter/select the following:
 - a. **Empl ID**
 - b. **Empl Rcd**: Defaults to **0**. Update if necessary.
 - c. **Earn Code**: LNP
 - d. **Earns Begin Dt**: enter the begin date of the period the employee is being docked
 - e. **Earns End Dt**: enter the end date of the period the employee is being docked
Note: If the pay docking is for a prior period, the employee must have regular pay in that period for the LNP to process. If the employee does not have regular pay, process the LNP in the current period.
 - f. **Oth Hrs**: enter the hours to be docked (in this scenario 8)
 - g. **Hourly Rate**: Enter the hourly rate for the period.
2. Validate and submit the transaction for approval.

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page

In the **Other Earnings** section of the **Review Paycheck** page, you are able to see the SPOT transaction that processed for the employee.

Begin Date

03/25/2021

End Date

03/25/2021

Addl Line Nbr

3

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.038462

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

1-1 of 1

View All

Other Earnings Details 1

Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source
LNP	Insufficient Leave	Hourly Rate	8.00	21.710000	173.68	OP

The **LNP** displays in the **Other Earnings** section for the specific period the that it was entered in SPOT.

Begin Date

03/25/2021

End Date

03/25/2021

Addl Line Nbr

4

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.038462

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

1-1 of 1

View All

Other Earnings Details 1

Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-8.00	21.710000	-173.68	OP

A second line for **Regular Time – Salaried** (RGS) is automatically created by Cardinal during the SPOT Load Process for LNP.

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Entering Adjustments to Regular Pay – Hire or Terminated Mid Pay Period

If an employee is hired/terminated in the middle of the pay period a reduction of regular pay may be necessary. When an employee is hired or terminated within the pay period, the system calculates partial pay based on an annualized hourly rate and not the pay period hourly rate.

Payroll Administrators will need to calculate what the employee is due using the pay period hourly rate and enter the adjustment in SPOT.

In this scenario, an employee terminates in the middle of the pay period (11/1).

- The system will calculate the partial pay from 10/25 – 10/31 that is due to the employee at an annualized hourly rate.
- You will need to calculate the amount due using the pay period hourly rate then enter the adjustment in SPOT.
- For this scenario, the employee needs to have a pay reduction of \$41.25.



The screenshot shows the SPOT system interface. The top section displays employee details for a terminated employee. The bottom section shows the adjustment entry form.

Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Period
1	1		0		Terminated	RGS	Regular Time - Salaried	10/25/2021	10/31/2021	1

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subst ID	Genl Ded Taken	Genl Ded Subst	Sepchk #
Annualized	-1.00	41.250000		Deduction		Deduction		0

- Enter the following:
 - Empl ID**
 - Empl Rcd**: Defaults to 0. Update if necessary.
 - Earn Code**: RGS
 - Earns Begin Dt**: enter the begin date of the period the employee terminated
 - Earns End Dt**: enter the employee's last day worked
 - Oth Hrs**: enter -1
 - Hourly Rate**: Enter the amount of pay to be reduced
- Validate and submit the transaction for approval.

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page

In the **Other Earnings** section of the **Review Paycheck** page, you are able to see the SPOT transaction that processed for the employee.

Earnings

Q

|

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4 of 4

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|

View All

Begin Date

10/25/2021

End Date

10/31/2021

Addl Line Nbr

3

Reason

Empl Record

0

Benefit Record

0

Additional Data

Salaried

Hours

0.00

Rate

24.697596

Earnings

0.00

Hourly

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

Overtime

Hours

0.00

Rate

0.000000

Earnings

0.00

Rate Code

State

VA

Locality

Rate Used

Hourly Rate

Shift

Not Applicable

Shift Rate

Other Earnings

Q

◀

1-1 of 1

▶

|

View All

Other Earnings Details 1

Other Earnings Details 2

||▶

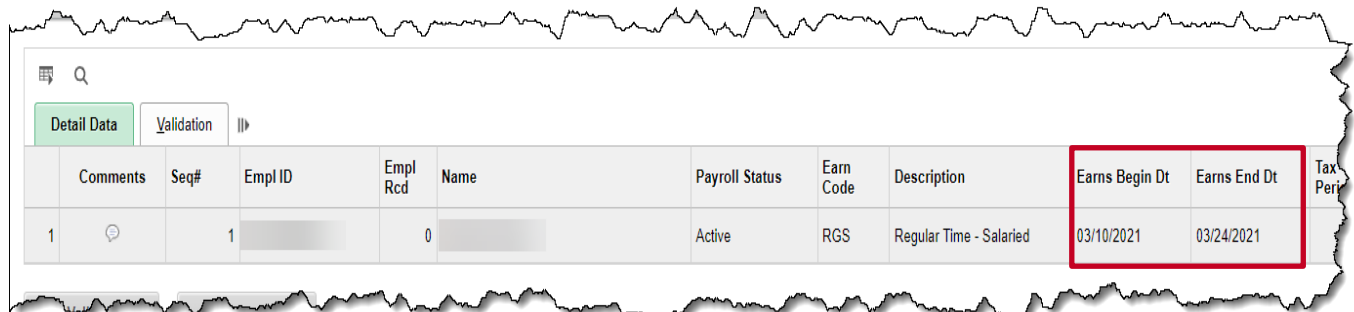
Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	-1.00	41.250000	-41.25	OP

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Entering Adjustments to Regular Pay – Change in Compensation from Prior Period

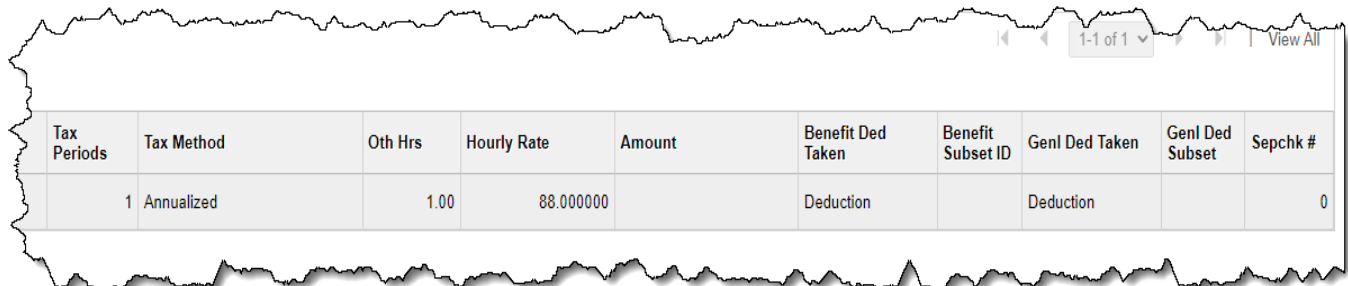
If an employee has a change in compensation, an addition to regular pay may be necessary.

For this scenario, the employee received an increase in the regular pay rate in the prior period. When this occurs, the Payroll Administrator will calculate the amount of the increase and enter it into SPOT.

In this example, the current pay period is 3/25 – 4/9/2021. The increase is \$1 an hour based on 88 hours in the prior pay period, 3/10-3/24/2021, which are entered in the **Earns Begin Dt** and **Earns End Dt** fields.



Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Peri
1	1		0		Active	RGS	Regular Time - Salaried	03/10/2021	03/24/2021	



Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #
1	Annualized	1.00	88.000000		Deduction		Deduction		0

1. Enter the following:
 - a. **Empl ID**
 - b. **Empl Rcd**: Defaults to **0**. Update if necessary.
 - c. **Earn Code**: RGS
 - d. **Earns Begin Dt**: Enter the begin date of the prior pay period
 - e. **Earns End Dt**: Enter the end date of the prior pay period
 - f. **Oth Hrs**: enter 1
 - g. **Hourly Rate**: Enter the amount of pay to be added for the employee, based on your calculation.
2. Validate and submit the transaction for approval.

PY381 Using the Single-Use Payroll Online Tool (SPOT)
Review Paycheck Page

In the **Other Earnings** section of the **Review Paycheck** page, you are able to see the SPOT transaction that processed for the employee.

Begin Date 03/10/2021 **End Date** 03/24/2021

Addl Line Nbr 3 **Reason**

Empl Record 0 **Benefit Record** 0

[Additional Data](#)

Salaried

Hours 0.00
Rate 24.038462
Earnings 0.00

Hourly

Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code

Overtime

Hours 0.00
Rate 0.000000
Earnings 0.00
Rate Code



State VA

Rate Used Hourly Rate
Shift Not Applicable

Locality

Shift Rate

Other Earnings

1-1 of 1

[View All](#)

Other Earnings Details 1

Other Earnings Details 2

||>

Code	Description	Rate Used	Hours	Rate	Amount	Source
RGS	Regular Time - Salaried	Hourly Rate	1.00	88.000000	88.00	OP